

The Private Client.

HOW THE WEALTHY ARE
GIVING BACK



THE GUIDE TO
PHILANTHROPY

2026



If you're in the luckiest one percent of humanity, you owe it to the rest of humanity to think about the other 99 percent.

Warren Buffett

Guest editor:
Tara Loader Wilkinson

Media contact:
partners@wamplify.com

Creative:
www.wam.digital

CONTENTS

2026 EDITION



05

What is philanthropy?

How wealth, responsibility and stewardship are being redefined



25

Beyond the blank cheque

Why lasting impact demands more than capital alone explains Yves Guélat, CEO of Charles Monat Associates



08

Individual giving typologies

Eight distinct approaches shaping the art of modern giving



27

Next gen giving: Tomorrow's philanthropists

A new generation is rewriting the rules of giving

34

Emerging philanthropy in Asia

Where private traditions are evolving into purposeful structures

36

Philanthropy with purpose

An interview with Jessica Samadi, Head of Corporate and Trusts of Trident Trust

39

How to start being a philanthropist

Turning personal conviction into meaningful, lasting action

47

Eliminating trust issues

Rebuilding confidence between those who give and those who deliver

CHARLES MONAT

The world's premier consultant for wealth transfer and liquidity planning since 1971.

Your achievement
His legacy.



monat.com



CHARLES MONAT

BEYOND THE BLANK CHEQUE.

BY YVES GUÉLAT | Group Chief Executive Officer, Charles Monat Associates

Philanthropy is playing an increasingly important role in addressing some of society's most complex and persistent challenges. As unprecedented wealth is created and transferred between generations, expectations of how charitable capital is deployed are evolving. Increasingly, philanthropy is judged not simply by how much is given, but by the lasting value it creates. Sustainable philanthropy reflects this shift, focusing on long-term solutions that build local capability, strengthen communities and deliver measurable impact well beyond the initial gift.

**Charles Monat
Associates / Save
the Children**

PROGRAMME
PARTNER

50th

ANNIVERSARY

581,237

in Lombok,
Indonesia

27,080

in Sichuan,
China

YOUNG LIVES IMPACTED

283

Nurses trained in
Lombok, Indonesia

759

Healthcare workers in
Sichuan, China



For most of its modern history, corporate philanthropy has been transactional. A cause is chosen, a cheque is written, a photograph is taken. Yet the causes that matter most rarely yield to one-off gifts. They require the slower, less visible work of building capability, and the discipline to measure whether that work changes anything at all.

When Charles Monat Associates reached its fiftieth anniversary in 2020, we wanted to mark the milestone with something that reflected what the firm actually does: protect lives and secure futures. Rather than a commemorative donation, we set an operating principle - *one for one*. Every life insurance policy we facilitate would be tied, symbolically and financially, to saving a child's life.

We chose childhood pneumonia, still among the leading cause of preventable death in children under five, and partnered with Save the Children to work where the need is most acute, beginning in Indonesia and extending to China and Bangladesh.

The more important decision was *how* to give. Instead of unretracted cash, we invested in people and systems: community health education for parents and caregivers, training for frontline doctors, nurses and volunteers to recognise and treat pneumonia early, and support for the local infrastructure that must carry the work long after any single donor moves on. Prevention over emergency aid; capability over cash.

Every element was built around metrics, children reached, health workers trained, cases prevented, because a mission you cannot measure is difficult to improve, and harder still to trust. Five years on, the programme has reached hundreds of thousands of children who now have a great start to a long, healthy life, and a local healthcare system equipped and empowered to help save more young lives.

The lesson is not that money does not matter; it plainly does. It is that alignment matters more. When a firm's philanthropy draws on the same expertise that defines its business, in our case, the protection of lives, the results is more authentic, more durable and, crucially, more accountable. That, we believe, is where meaningful giving is heading.

“

Charity asks how much you gave. Philanthropy asks what changed, and whether it will still be true in ten years.

Yves Guélat
Group CEO,
Charles Monat
Associates



Yves Guélat is Group Chief Executive Officer of Charles Monat Associates, an international life insurance brokerage specialising in legacy and wealth planning for high net worth individuals and families. He champions the firm's philanthropy programme alongside Eileen Soh, Head of Channel Management and Marketing & Group Head of Branding and Communications. Founded in Hong Kong in 1971, the firm's "Save of Live for Every Policy" initiative is delivered in partnership with Save the Children.