

Building A Culture Of Giving

An Interview with R. Barkley Payne, President and Chief Executive Officer, Invest in Others Charitable Foundation

EDITORS' NOTE In February 2023, Barkley Payne joined the leadership team of Invest in Others. With more than 30 years of experience as a nonprofit leader, he brings a wealth of expertise to his role as its President & CEO. In this capacity, he leads the organization's operations and drives strategic initiatives to enhance its programs, strengthen fundraising efforts, and elevate marketing and administrative/governance functions. His extensive experience in health-care philanthropy has led to leadership roles at several national association foundations. He most recently served as Executive Director of the American Medical Association's charitable foundation and joined its senior management team in 2014. For 12 years, he led the American Dental Association Foundation as its Executive Director. He was then Vice President of Strategic Philanthropy for the Orthopedic Research and Education Foundation. A native of Bowling Green, Kentucky, Payne held executive and development positions with Metro Louisville and the Louisville Orchestra. In November 2021, Payne was presented with the Association Foundation Group (AFG) Leadership Award in recognition of his work in strengthening the national association foundation professional community. He served as AFG president in 2015. He was awarded in 2009 with two honorary fellowships by the American College of Dentists as well as the International Academy of Dental Facial Esthetics, the highest awards given to non-DDS professionals. Payne is a past president of the Western Kentucky University Alumni Association Board of Directors and currently serves on the Board of Directors for Access to Care, a healthcare program serving low-income uninsured individuals in suburban Cook County (Illinois). In addition, he is a long-time member of the Association of Fundraising Professionals, Association Forum of Chicagoland, Chicago Council of Planned Giving, Medical Society Fundraising Network, and the Chicago Health Executives Forum. As a volunteer, he has served on numerous boards including the Dental Philanthropy Network, National Kidney Foundation of Kentucky, Louisville Zoo Foundation, and the Association of the Louisville Orchestra. Payne earned a BA in public relations at Western Kentucky University.



R. Barkley Payne

ORGANIZATION BRIEF *Invest in Others Charitable Foundation (investinothers.org) aims to amplify, celebrate, and inspire the charitable work of the financial services community. Invest in Others is a catalyst to channel philanthropy and volunteerism to where it is needed most.*

Will you highlight your career journey?

I took the helm of the Invest in Others Charitable Foundation in early February 2023, stepping into the role of President and CEO following an extensive career in nonprofit philanthropy. At Invest in Others, I've led efforts to amplify the charitable work of financial advisors and their firms, overseeing strategy, operations, fundraising, grant programs, marketing, and organizational growth. We've built a great team, and the foundation continues to expand its visibility and impact, exemplified by awards and grants administered to advisors and nonprofits nationwide.

Prior to joining Invest in Others, I served as Executive Director of the American Medical Association Foundation. During my tenure, I scaled fundraising, expanded grant-making programs, and launched innovative initiatives to support physician training and health

equity. My earlier nonprofit leadership roles include serving as Executive Director of the American Dental Association Foundation, and as Vice President for Strategic Philanthropy at the Orthopedic Research & Education Foundation, reinforcing expertise in healthcare-related philanthropy and nonprofit development.

My career spans over two decades guiding mission-driven organizations and with my transition to financial services, a new industry focus, I'm thrilled to help lead the Invest in Others Charitable Foundation into celebrating its 20th anniversary in 2026.

What excited you about the opportunity to lead Invest in Others and made you feel it was the right fit?

What excited me most about the opportunity to help lead Invest in Others was the chance to combine two of my core passions: strategic philanthropy and empowering individuals to make a difference in their communities. Throughout my career, I've had the privilege of working with organizations that drive meaningful impact, but what stood out about Invest in Others was its unique focus on celebrating and supporting the charitable work of financial advisors, people who are using their success not just for personal rewards, but to uplift people and communities. That mission deeply resonated with me.

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I also saw incredible potential in the organization's ability to grow its influence across the financial services industry. The opportunity to expand grant programs, deepen industry and community partnerships, and amplify the stories of these financial advisors felt both inspiring and aligned with my experience.

Ultimately, it was clear to me that Invest in Others is not just recognizing generosity; it's actively helping shape and support a culture of giving within an entire profession. That's the kind of work I'm very proud to lead.

How do you define Invest in Others' mission?

Invest in Others' mission is to amplify, celebrate, and inspire the charitable work of the financial services community. It's about elevating the generous work financial advisors do in their communities by sharing their stories, delivering grantmaking and awards that reward impact so more can be accomplished, and working with firms to put the focus on and scale meaningful giving.

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How is Invest in Others shining a light on financial professionals making a difference through nonprofit work?

Invest in Others highlights financial advisors making a difference by recognizing and celebrating their philanthropic efforts through a flagship program, the Invest in Others Awards. These national awards honor advisors who are deeply involved in nonprofit work, highlighting their contributions and helping raise awareness for the causes they support. In addition to recognition, the foundation provides grants that directly fund these financial advisors' charitable initiatives, enabling them to expand their impact and continue serving their communities.

Beyond awards and grants, Invest in Others amplifies these stories through thought leadership, media coverage, and strategic

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storytelling, inspiring others across the financial services industry to engage in meaningful giving. Through all of this, Invest in Others is helping build a profession-wide commitment to community impact, making philanthropy a defining part of what it means to be a successful financial advisor.

What are the ways financial advisors can integrate charitable values into their business to better engage clients?

Financial advisors can integrate charitable values into their business by aligning their services with their clients' personal values and philanthropic goals. This can include offering guidance on charitable giving strategies, such as donor-advised funds, charitable trusts, or tax-efficient donation planning, as part of the broader financial planning conversation. By helping clients maximize the impact of their giving, financial advisors can provide added value and also build deeper relationships rooted in shared purpose. Financial advisors can also ask intentional questions during onboarding or

reviews to understand the causes that matter most to clients, signaling that community impact is an integral part of wealth stewardship.

Additionally, financial advisors can lead by example, actively participating in or supporting local nonprofits and encouraging client involvement through volunteer events, community sponsorships, or matching gift opportunities. Hosting educational sessions or workshops on legacy giving, impact investing, or socially responsible financial strategies can also further engage clients and foster trust. When clients see their financial advisor modeling charitable leadership and providing tools to make giving easier and more effective, they're more likely to view their advisor not just as a financial partner, but as a meaningful collaborator in building a legacy.

What are your priorities for Invest in Others as you look to the future?

As we look to the future, our priorities at Invest in Others are grounded in a strategic three-year plan focused on investment, learning, growth, and sustainability. We're prioritizing investment in our systems, tools, people, and relationships. That means expanding our infrastructure to support growth, deepening our data capabilities to better understand impact, and cultivating new partnerships across the financial services industry. We're also investing in learning: gathering insights from our grantees, finalists, financial advisors, and sponsors to ensure our brand and programs are clear, responsive, inclusive, and aligned with the evolving needs of the communities we serve.

We're also working to scale our flagship awards and grant programs, enhance year-round storytelling, and position Invest in Others as a trusted philanthropic resource for both financial advisors and firms. At the same time, we'll be identifying new ways to drive sustained funding and strengthen our foundation's visibility and impact. Ultimately, our goal is to create a lasting framework that celebrates and supports charitable leadership within financial services, not just today, but for years to come. ●

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