

## Philanthropy Management

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With the right advice, your good intentions can become your greatest legacy. Your favorite causes can become family causes. Your wealth can become a tool to change lives. Your passion for others can become a strategic plan for giving and one that inspires others to follow suit. If your passion leads you to join a nonprofit board, there are ways to help ensure that the nonprofit is governed well and raises funds effectively.

We believe your philanthropic dollars should be managed and allocated as strategically as the rest of your wealth. Depending on client circumstances, we in Philanthropy Management will review your situation and offer insight in such areas as innovative giving strategies, effective grantmaking and international philanthropic planning.

In addition, we educate clients on the benefits of creating family mission statements, identifying potential charitable vehicles and reviewing methods of measuring how effectively charitable dollars are spent.

Philanthropy Management also works with nonprofits and foundations

to ensure the strategic growth and development of their charitable missions and programs. Working with nonprofits and their outside advisors, we advise on board governance structures and policies that are designed to help protect and grow the organization. We offer nonprofits guidance in capacity-building; assistance in identifying scaling initiatives through collaborative funding opportunities; and counsel in brokering gifts with individuals, private foundations and other funding sources. We specialize in board development and seek to empower all boards to be confident in the responsibilities of governance and fundraising.

### ADVISORY SERVICES

- Identifying effective and strategic giving options
- Researching various charities, and assisting you in identifying ones that complement your philanthropic aims and operate efficiently
- Conducting philanthropic meetings and retreats in discussing family values, grantmaking strategies and charitable goals

### INNOVATIVE GIVING ASSISTANCE

- Offering insight and background on establishing private foundations, donor advised funds and other charitable vehicles
- Educating you on different ways of tracking the effectiveness of your philanthropy
- Keeping you informed as trends in philanthropy emerge and change
- Supporting your private foundation, donor advised fund, charitable trust and nonprofit organization in creative programming to scale the impact of your gifts

### CONNECTIONS

- Establishing philanthropic-giving circles which extend the impact of individual efforts
- Identifying board positions and assisting you through the protocol of becoming a board member, e.g., preparing a board member resume, engaging in mock interviews, etc.
- Working with you and your outside advisors on creating grant agreements and negotiating the terms of your gift

- Connecting you to nonprofit leadership and industry experts
- Helping to organize site visits to nonprofit organizations and projects so you can make choices based on firsthand experience
- Publishing Perspectives in Philanthropy, a journal that features stories of generosity from valued clients and leaders in the field of charitable giving

#### **NONPROFIT MANAGEMENT SERVICES**

- Identifying high-impact board members
- Evaluating and retooling governance policies and procedures

- Assisting nonprofit boards maximize their fundraising capabilities
- Performing nonprofit financial health analyses which identify indicators that might be relevant in measuring an organization's long-term stability and effectiveness
- Teaching board members how to be leaders and serve their nonprofits meaningfully

#### **FOUNDATION MANAGEMENT SERVICES\***

- Foundation Management Services offers a sophisticated, turn-key, Web-based, back-office solution for family and corporate foundations

#### **MORGAN STANLEY GLOBAL IMPACT FUNDING TRUST (GIFT)**

- The Firm's global donor advised fund, with a unique platform offering both individuals and nonprofit institutions cutting-edge strategies for giving and fundraising

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