July 2025 Newsletter

Greetings from The 801 Group at Morgan Stanley,

The 801 Group at Morgan Stanley is pleased to offer these resources in charitable giving. Our hope is that the timely resources provided in this newsletter will support you as a leader, strengthen your organization, and provide useful information for discussions with donors.

Investment Perspectives – On the Markets

As investors reflect on the first half of 2025, it's hard not to describe the economic and geopolitical backdrop as historic, the uncertainty that created a one-week equity bear market as nearly unprecedented and the subsequent 25% retracement to new highs as positively relieving. But here we are. For the year to date, the S&P 500 Index is up more than 5%. So the key question is, where to go from here? Click Here to Read More About The New Bull Market

In Our Ears: This Week's Top Listen

In a recent Chronicle survey, only 25% of nearly 350 Executives described their board members as being enthusiastic fundraisers. Getting nonprofit board members involved in fundraising is a common challenge, but also a crucial factor to a nonprofit's success. Here are effective strategies to increase your board engagement:

1. **Set Expectations Early**
    - Include fundraising responsibilities in board member job descriptions.
    - Discuss these expectations during recruitment and onboarding.
2. **Provide Training and Tools**
    - Offer fundraising training sessions to build confidence and skills. **(Ask us about our Planned Giving presentation for boards)**

Listen Now: Two CEOs on How to Get Boards to Help With Fundraising and More

Foundation and Endowment Fiduciary Symposium – Join Us – September 17, 2025

Mark your calendars for a day of learning and collaboration at our annual Foundation and Endowment Fiduciary Symposium on September 17th at Des Moines Golf and Country Club from 9:30 AM-3:30 PM. This complimentary symposium is a must for officers, directors, trustees, and investment committee members of foundation and endowment organizations seeking to enhance their contributions to the institutions they serve. This symposium will feature insightful speakers, interactive conversations and ample networking opportunities. Don't miss

this chance to connect with like-minded individuals and organizations for conversation and education on topics such as, Dismantling Burnout: Empowering Leaders and Teams to Overcome Burnout Together, Outlook for the Economy and Monetary Policy, Peer Trends and Benchmarking for Mission Success and Unlocking the Power of AI. RSVP here!

What We Are Reading: Curated Content of Interest & Additional Resources[1]

7 Tips to Kickstart Monthly Giving and Boost Your Nonprofit's Financial Health

How to Use A.I. Effectively and Protect Your Organization's Reputation and Values

Raising Money From Individuals: What's Happening Now

Beyond Either/Or: The Power of Both | Thompson & Associates

Advocacy Alerts and Updates:

Last week, President Trump signed into law H.R. 1, previously known as the "One Big Beautiful Bill Act." The sweeping tax legislation makes significant changes to the U.S. tax code, including the creation of a universal charitable deduction. Click here to read more on the top priorities impacting the nonprofit sector as compiled from the National Council of Nonprofits: Analysis of the 2025 Tax Bill and Its Impact on Charitable Nonprofits

Share the News

If colleagues, additional leaders in your organization, or board members would like to receive this philanthropic resource, please let us know by responding to this email.

The 801 Group at Morgan Stanley values philanthropy and strategic investment with nonprofit organizations that enable them to focus on their missions. With more than 90* years of collective industry experience, our team serves some of the largest public and private entities in the Midwest, along with many successful families throughout the country.

While you Advocate for Your Mission, The 801 Group at Morgan Stanley Advocates for You!

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