Morgan Stanley

PRIVATE WEALTH MANAGEMENT

PHILANTHROPY MANAGEMENT

The BlueStone Wealth Management Group at Morgan Stanley

FAMILY OFFICE SERVICES

Philanthropy Management

Innovative and Effective Giving Strategies Allocated to Do the Most Good

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 grant-making 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.

Techniques of Charitable Giving

	CHARITABLE GIFT ANNUITY	POOLED-INCOME FUND	CHARITABLE REMAINDER TRUST	PRIVATE FOUNDATION	DONOR-ADVISED FUND
Cost to Set Up	None	None	Moderate	High	None
Cost to Maintain	None	None	Moderate	High	Low
Generates Income	Yes	Yes	Yes	No	No
High Control	No	No	Yes	Yes	Yes
High Complexity	No	No	Yes	Yes	No

For Illustrative Purposes Only. Discuss with your tax and legal advisor before implementing any particular strategy.

Foundation Management Services*

Foundation Management Services offers a sophisticated, turnkey, web-based, back-office solution for family and corporate foundations.

*Services may be provided by third parties.

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.
- Certain clients may benefit from our assistance in implementing philanthropic family values, grant-making 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 change.
- Supporting your private foundation, donor-advised fund, charitable trust and nonprofit organization in creative programming to scale the impact of your gifts.

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