



Philanthropic Advisory Services & Support for Families, Individuals, and Couples



Philanthropic Exploration - Explore past experiences—positive and negative—with giving or community involvement. Those positive experiences can help shape future philanthropy in order to foster similar experiences. With your interests and passions in mind, develop action steps for making a difference in the issues that are important to you through philanthropy and other types of civic engagement.

Suggested Start-up Engagement - Flat Fee

- One hour-long in-person exploration session
- Two 45-minute planning and action sessions via phone or zoom
- Email access to respond to questions and to work through challenges
- In-depth review of up to five nonprofit organizations, based on exploration session, to assess giving and engagement opportunities
- Resources shared on philanthropic best practices, giving decision making, having authentic conversations with nonprofits, and more

Coordination with financial, wealth, or other advisors—Reviewing how philanthropic planning integrates with wealth management, estate planning, and other activities, such as allocation of resources, philanthropic decision-making, involvement of family members, and engagement with charities, etc.

This coordination and collaboration is built into all service agreements, both project-based and hourly.

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Philanthropy In This Moment - 2025 saw considerable social, political and economic shifts and challenges, and 2026 shows no sign of being different. For many families, this can be an opportunity to reflect on their current giving practices and the challenges of the time. The goal is to discern how their personal philanthropy might change or shift in focus, format, or purpose. Together, we can explore potential ways to respond to the times and meet the evolving needs and concerns in the community. While there is no single correct way to approach this, it is important to pause and assess how you and your family are responding to the issues of the day. We can then map out a plan for the future.

This is a separate, more complex conversation that also will benefit from involving your other advisors.

See reverse side for additional services



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Planning & Implementation —Making sure you are being intentional regarding your philanthropic purpose, principles, and approach, understanding how that approach aligns with your values. Additionally, if your philanthropic plan involves establishing a private foundation, for example, helping you to design a process for making grants in a thoughtful and equitable manner.

This can be arranged as an extension of the Start-up Engagement or as a stand-alone project for families looking to build additional structure into their giving.

“Nonprofit 101” - Understand how nonprofits are managed, exploring the different types of organizations, such as direct services or those focused on policy and social issues. Learn how both volunteering and contributions can be enriching ways your whole family can play a part. By learning how philanthropy fits into the overall picture of what it takes to sustain a successful organization, you can make smarter giving decisions. The end result is a higher quality relationship with the organizations you support!

This also can be arranged as an add-on to the Start-up Engagement or as a separate 45-60 minute conversation.

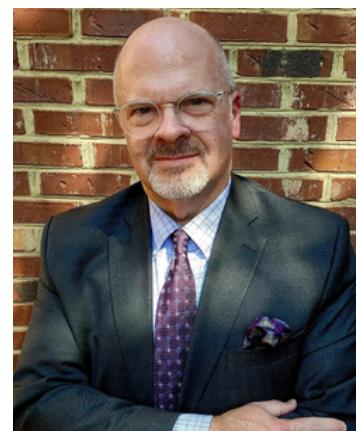
These are suggested engagement opportunities. Advisory services and support are designed to meet your specific needs, interests, experience level, and goals. Feel free to inquire, and a tailored service proposal can be developed for you.



Consultant Member



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