



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



Philanthropic “Brainstorming” - A time-efficient engagement to help learn more about your interests and passions, as well as explore your past experiences—positive and negative—with giving and/or community involvement. We will talk about the impact those positive experiences had on you personally, discerning how your future giving might foster similar experiences. The goal is to generate ideas on how you might be able to use philanthropy to make a difference in things that are important to you, creating a general “road map” for potential next steps.



Coordination and planning in partnership with your financial, wealth, or other advisors—Exploring how philanthropic planning might impact your wealth management, estate planning, and other activities, such as allocation of resources, philanthropic decision-making, and engagement with charities, etc.



“Nonprofit 101” - Time can be spent with you, family members, and other responsible parties to review and discuss the basics of how nonprofit organizations are managed. We will explore the different types of nonprofits, such as those providing direct services and organizations that address policy and social issues, for example. The goal will be to enhance your understanding of how your philanthropic and volunteer support can fit into the overall picture of what it takes to sustain a successful organization.



Planning & Implementation of Philanthropic Practice—When you and your family are ready to make philanthropy an ongoing part of your life, there are steps that you can take to ensure you are clear regarding your purpose, principles, and approach. We can together work through any of several nationally recognized planning tools such as the Guide for Effective Family Philanthropy produced by the National Center for Family Philanthropy.

If you already have a basic process in place and an idea of how you will approach philanthropy and community support, we can spend time assessing how that approach is working and review whether it still fully aligns with your values and vision. Tools such as Capital Philanthropy’s “Change Up Your Questions” can provide a useful way to take a look at what you’re currently doing and make sure everything lines up with your goals.

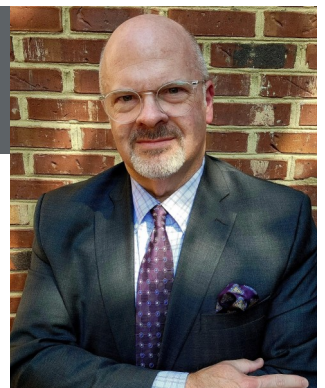
These are suggested engagement opportunities. Advisory services and support are designed to meet your specific needs, interests, experience level, and goals. Feel free to inquire, and a tailored service proposal can be developed for you.

Let’s talk about what we can achieve together!

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