

PHILANTHROPY TOOLKIT

AN OVERVIEW

Introducing the Philanthropy Toolkit

At Fiduciary Trust International, we emphasize philanthropic planning among our clients to develop focus and vision and to better provide meaningful support to our clients, their families and their interests.

We have partnered with Stanford University to generate a one-of-a-kind resource, Fiduciary Trust International's Philanthropy Toolkit. Stanford University's Center for Philanthropy and Civil Society (PACS) created this toolkit in collaboration with hundreds of advisors across the US in response to the philanthropic questions, challenges and opportunities their clients face every day.

Sharing in PACS's philosophy and framework for working with philanthropically-inclined clients, we used Stanford's research to create a unique version of the Philanthropy Toolkit to best suit the needs of our clients and team members. We share in the philosophy and resources provided by Stanford researchers to better assist our individual and family clients interested in being more effective and involved with their charitable giving.

Using the toolkit for your charitable planning

The Philanthropy Toolkit is a step-by-step guide that helps you explore, define and ultimately execute on your giving strategy to meet your charitable giving goals.

Each module focuses on a unique area in the process. Modules can be used consecutively, or as stand-alone guides, depending on your specific needs.

If you would like a copy of the full toolkit or any of the individual modules described in this overview, please contact your Fiduciary Trust International advisor.

Overview



Module 1: Finding Your Focus Areas

The simplest way to organize your philanthropy is to focus on several specific issues, rather than giving across many issues.

Narrowing your focus areas for proactive giving helps prioritize your resources. We help you find balance and deploy your resources towards your focus areas for maximum impact.



Module 2: Collaborating with Others

High-capacity donors—especially those who already have significant philanthropic experience—are increasingly seeking to collaborate with others.

Collaboration is a growing strategy in philanthropy, allowing donors to combine funding, knowledge and expertise, and can be an effective way to leverage and scale your giving.



Module 3: Involving Family

Involving your family can take multiple forms, from involving them in decision-making to preparing for eventual succession. It is useful to be clear about your expectations for various family members' roles and to seek their buy-in. Strategic planning can lead to better family dynamic outcomes. Likewise, philanthropy is an opportunity to bring family together around a common goal, communicate values across generations and develop a sense of social responsibility in the rising generations.



Module 4: Structuring Your Giving

A philanthropic giving vehicle provides a structure for you to carry out your giving. While you can achieve your philanthropic objectives through any vehicle, the goal here is to ensure you select the vehicle or combination of vehicles that best aligns with your broader goals.



Module 5: Grantmaking: Find, Vet and Gift

You may already have organizations you support; however, we still encourage you to learn about other organizations in your focus areas to ensure your giving is as effective as possible.

We can help you vet the organizations you have shortlisted understand how best to monitor and evaluate their work and, ultimately, track and learn to increase the effectiveness of your gifts.

We are here to help

Given the importance of philanthropic and organizational issues to our current and future clients, we have dedicated experts in our Family Office Services, Foundations & Endowments Division who are available to consult and/or help execute a strategy in partnership with your client team.

Please contact your Fiduciary Trust International advisor to learn more about how we can help meet your philanthropic planning needs.

GROWING AND PROTECTING WEALTH FOR GENERATIONS

Fiduciary Trust International is a wealth management firm founded in 1931 by families for families, with a singular focus on growing and protecting your wealth through generations. We work closely with individuals, families and foundations to build and manage personalized investment portfolios, and to develop estate plans that extend wealth to future generations.

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