

# Charitable Solutions for Clients and Advisors

For clients who want maximum impact and a charitable legacy for generations to come...

## Endowment

Whether a donor advised fund, scholarship, memorial fund, etc., endowing a fund ensures support for organizations and causes dear to clients' hearts in perpetuity in their name.

For clients who want flexibility in charitable giving, advice on impacting causes they care about...

## Donor Advised Fund

Clients can give to any 501(c)3 public charity, place of worship, or school locally, regionally or nationally.

For clients who want to leverage their investments for even greater impact...

## Impact Investments

Clients invest their charitable fund's assets to make a social or environmental impact with a financial return.

For clients who need to make a qualified charitable distribution from their IRA...

## Designated Fund, Unrestricted Fund, Field of Interest Fund, Scholarship Fund

Clients support one or more *\*named\** charities

For clients who want or have a private foundation...

## Supporting Organization

Clients get flexibility and service, but under their own legal entity.

## Grantmaking Services

Our philanthropic experts can design a custom, online grantmaking process.

## Private Foundation

Our team of experts can professionally manage your clients' private foundations.

If you want to help your clients plan for the future...

## Multigenerational Giving

Our philanthropic experts can provide opportunities for you to engage your clients' younger generations.