Philanthropy UK's
Quick guide to philanthropy advisors

In our 'at-a-glance' guide, philanthropy advisors have listed the services they offer. We have presented this in a matrix so you can easily compare providers.

By clicking on the name of the provider in the interactive matrix, you can link directly to the Provider Services appendix. This details their services, their unique selling point and the fees they charge.

If your organisation offers philanthropy advice to donors and you would like to add your services to our ***Quick guide to philanthropy advisors*** CLICK HERE. You will be taken to where you can download a form to complete and email (editor@philanthropyuk.org) back to us.

Explanation of service categories

Mechanisms: The provider will set up vehicles through which clients can give, such as charity accounts and charitable trusts, and will undertake the associated ongoing administration, such as registration with the regulator and reporting.

Donor advised fund: The provider has an established donor advised fund which allows clients to give in partnership with other donors to specific causes.

Tax advice: The provider offers specialist tax advice, planning and structuring services to optimize the tax efficiency of clients' giving.

Donor education: The provider offers advice at various stages of the client's philanthropic journey. This often includes early stage advice to identify clients' motivations to give and may provide workshops through which a client can learn more about ways to give and specific charities and causes.

Donor networking: The provider offers networking events for clients such as forums and workshops or access to their networks.

Charity recommendations: The provider will undertake 'due diligence' work and research into specific charities and rate them against set criteria.

Monitoring and evaluation: The provider offers ongoing monitoring of donations and the impact they make with regular feedback to the client

Cross-border giving: The provider has specialist knowledge, mechanisms or networks that allow them to offer clients the means to give efficiently and effectively across the globe.

Corporate philanthropy: The provider offers advice specifically targeted at companies to help them fulfil their CSR ambitions.

Key

Service provided in-house	●
Service provided in partnership	P
Service offered both in-house and in partnership	●P
Offers advice but no service provided	A
No service or advice provided	–

Specialist advisors	**Mechanisms** (eg charity trust, charity account)	**Donor advised fund**	**Tax advice**	**Donor education** (early stage advice, mentoring, etc)	**Donor networking**	**Charity recommendation**	**Monitoring and evaluation**	**Cross-border giving**	**Corporate Philanthropy**
Asian Foundation for Philanthropy	–	–	–	●	–	●	–	–	●
Association of Charitable Foundations	–	–	–	●	●	–	–	–	–
Charities Aid Foundation	●	●	–	●	●	●	●	●	●
Community Foundation Network	●	●	–	●	●	●	●	–	●
Geneva Global	P	P	–	●	–	●	●	●	●
Institute for Philanthropy	–	–	–	●	●	–	●	–	●
Investing for Good	P	P	P	●	●	–	●	P	●
New Philanthropy Capital	–	–	–	●	●	●	●	●	●
Pilotlight	A	A	A	●	●	●	●	A	A
Stewardship	●	–	●	●	–	–	A	–	–
The Trust Partnership	P	–	P	●	P	●	●	●	●
Theresa Lloyd Associates	A	–	–	●	●	● P	A	P	● P
Thomson Philanthropy	–	–	–	●	●	●	–	–	●

Solicitors	**Mechanisms** (eg charity trust, charity account)	**Donor advised fund**	**Tax advice**	**Donor education** (early stage advice, mentoring, etc)	**Donor networking**	**Charity recommendation**	**Monitoring and evaluation**	**Cross-border giving**	**Corporate Philanthropy**
Bates Wells & Braithwaite	●	A	● P	●	–	–	A	●	●
Farrer & Co	●	–	●	● P	●	● P	–	●	●
Maurice Turnor Gardner	●	A	●	● P	–	P	P	●	●
Withers	●	A	● P	● P	–	P	P	●	●

Wealth Managers	**Mechanisms** (eg charity trust, charity account)	**Donor advised fund**	**Tax advice**	**Donor education** (early stage advice, mentoring, etc)	**Donor networking**	**Charity recommendation**	**Monitoring and evaluation**	**Cross-border giving**	**Corporate Philanthropy**
Barclays Wealth	A P	A P	P	●	●	P	P	P	A
Coutts & Co	●	●	●	●	●	P	● P	● P	A
JP Morgan Private Bank	●	–	P	●	●	P	P	P	A
Spencer-Churchill Miller Philanthropy	–	–	–	–	●	●	●	–	●
Standard Chartered Private Bank	●	P	P	●	–	P	● P	●	●
Stonehage	●	–	●	●	●	● P	● P	●	–

International advisors	**Mechanisms** (eg charity trust, charity account)	**Donor advised fund**	**Tax advice**	**Donor education** (early stage advice, mentoring, etc)	**Donor networking**	**Charity recommendation**	**Monitoring and evaluation**	**Cross-border giving**	**Corporate Philanthropy**
Active Philanthropy (Ger)	P	–	–	●	●	A	● P	P	●
King Baudouin Foundation (Bel)	●	●	●	●	●	●	●	●	●
Philanthropy Ireland (Ire)	P	P	–	●	●	●	●	●	●
Rockefeller Philanthropy Advisors (US)	●	●	–	●	●	●	●	●	●
Tactical Philanthropy Advisors (US)	●	P	–	●	●	●	●	●	–
The Philanthropic Initiative (US)	–	–	–	●	●	●	●	●	●
VALUEworks (Switz)	●	–	P	● P	● P	● P	● P	P	● P
wise (Switz)	–	P	–	●	●	●	●	P	–

Appendix: *provider services*

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Specialist advisors

Asian Foundation for Philanthropy (AFP)

Our service
Asian Foundation for Philanthropy is very much a grassroots organisation, working with a number of partners in India. We believe in inspiring social change and our approach to philanthropy advice is based on our three E's – educate, engage and enable.

USP
Asian Foundation for Philanthropy was founded by Bala Thakrar, who spent 20 years in setting up grassroots projects. Grassroots communities should be "enabled" to identify local solutions for local issues. Philanthropic activities are only a means to an end.

Fee
Based on individual request.

▸ www.affp.org.uk

Association of Charitable Foundations (ACF)

Our service
Alongside our work with established trusts and foundations, ACF encourages the development of philanthropy and charitable giving through its Philanthropy UK project. ACF provides a framework in which charitable funders can work together, learn from each other's experience, explore matters of common concern and achieve good practice in grantmaking.

USP
Association of Charitable Foundations is the leading membership association for UK's charitable and independent funders and the gateway to a wealth of expertise in funding charities, voluntary organisations and social enterprises. Over 300 trusts and foundations have joined ACF, ranging in size from small and local grant makers to some of the world's largest foundations.

Member benefits include: networking opportunities on a range of funding issues, representation at a policy level with key government and sector decision makers, a protected space for charitable funders to discuss the issues that concern them and the highly-acclaimed quarterly publication *Trust & Foundation News*.

Fee
Advice on charitable giving and setting up a trust or foundation is given free of charge.

Membership of ACF is open to any UK organisation :

- which is an endowed foundation or
- makes grants for charitable purposes.

Non-UK grant making organisations which have an assured source of income may become associate members. Members pay an annual subscription on a sliding scale.

▸ www.acf.org.uk

Charities Aid Foundation

Our service
Charities Aid Foundation works internationally with donors to meet their aspirations and work with non-profits to develop their capacity to work with donors.

We have extensive knowledge of both donors and charities and are unique in this respect. Through our years of experience and our international network of offices we are able to develop philanthropy on a global scale. For example we were the first to work with emerging market donors in Russia and last year we ran 'Foundation Schools' to develop philanthropic giving in Brazil and Russia.

USP
We are an international non-profit organisation and registered UK charity with expertise in supporting charities and social enterprises. We do this by transforming the way donations are made and the way charitable funds are managed. We offer services that make it easy and attractive for donors to give no matter how much they have.

Fee
How we charge depends on the nature of the relationship, for example it will depend on whether it is a commercial one, or built into a broader relationship, or related to CAF's charitable mission. Some will be on a contract basis, others grants and others donor advised.

▸ www.cafonline.org

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Specialist advisors *continued*

Community Foundation Network

Our service
Community Foundations (CFs) offer professional and personalised philanthropic advice, strategic planning and grant portfolio development for clients. They offer in-depth knowledge of local communities; networking and education opportunities as well as opportunities to visit projects and learn about community issues. CFs provide a full grant making, monitoring and evaluation service. As CFs assess around 40-60,000 charities and community groups a year they are able to make specific charity recommendations based on clients' interests. CFs offer clients an investment vehicle for endowed funds as well as immediate spend (flow-through) funds, and are able to accept a wide range of assets in a tax efficient way. They take on legal and fiscal responsibility for a client's fund.

USP
Community Foundations are leading experts in revitalising local communities through effective charitable giving. CFs act as a vital link between donors and local needs by connecting those with money to dynamic local organisations whose ability to change lives for the better is only inhibited by a lack of money. A results-orientated culture and local expertise ensures that money invested makes the lasting difference donors want and expect.

Fee
For a full philanthropy service, the fees are 10-15% of grants made from the donors' immediate spend (flow-through) fund and 1.5% of the value of the fund per annum for endowed funds.

▸ www.communityfoundations.org.uk

Geneva Global International

Our service
Geneva Global exists to offer the donor a tailor-made service – matching their interests with exceptional high-impact programmes that they can directly connect with and see the results of their giving. We provide a unique suite of bespoke services designed to maximize the impact of their international philanthropic giving, and bring an investment banking mindset to the world of philanthropy. We work with donors to see that their giving catalyzes positive, life-changing results. With Geneva Global, donors will know what their giving accomplishes, and will understand the durable improvements they helped bring to individuals and their communities.

USP
Our distinctives include:

1) Significant international infrastructure, including a network of more than 400 community leaders and development experts around the world and grant management experience in over100 countries.
2) Use of sophisticated metrics and impact indicators unique to the industry to determine a project's social return on investment (SROI), giving donors the confidence of knowing exactly what difference their giving makes.
3) Industry-leading due diligence that applies an investment mindset to philanthropic giving and ongoing monitoring and reporting allows donors to see how their giving helped to transform lives and improve communities.

Fee
Geneva Global covers its costs in two ways. First, we charge fees for our customised consulting services on a time and cost basis, determined by the particular type of service the client requests. Secondly, for grants under management, we receive a fee in order to provide the necessary due diligence, monitoring, and evaluation services required by law for international philanthropic giving, and for the ongoing reporting services we provide. This fee varies according to the amount of work required, but is always less than 15% of grants managed.

▸ www.genevaglobal.com

Institute for Philanthropy

Our service
We offer advice to wealthy individuals and families, and to financial institutions; the service that we offer depends upon the requirements and requests of the client, and so this would involve anything from seminars and one-on-one education to weekend retreats with families.

USP
The Institute for Philanthropy works with a global network of over 200 donors and families. Participants in their programmes can draw on the knowledge and experience of this alumni support network. The Institute for Philanthropy arranges regular gatherings for alumni, including visits to the developing world, for continued learning. Their advanced programme is for donors who wish to become leaders in their field.

Fee
The Philanthropy Workshop: Annual programme for up to 15 wealthy donors, consisting of three one-week modules in London, New York and the developing world.
$18000 (approx £11,000)

Next Generation Philanthropy: Annual programme guiding the younger generation of wealthy families as they engage in their personal business or family philanthropy.
£4000

Strong Foundations: Six-day training course for staff of foundations of wealthy donors.
£4000 (discounted to £3,000 for the staff of foundations or grant making trusts that are registered charities)

Individual and Corporate Advising: Bespoke one-to-one advice for individual and corporate clients.
£1200 per day

▸ www.instituteforphilanthropy.org

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Specialist advisors *continued*

Investing for Good

Our service
Investing for Good advises on philanthropy and impact investing to private banks, wealth managers, asset managers, family offices, trusts and foundations.

Uniquely, we design and deliver portfolios whose primary purpose is to create positive social and environmental impact. These drive the solutions that reduce poverty, foster economic development, tackle climate change and improve access to healthcare, education and housing.

At the heart of what we do is our independent rating system for assessing the positive impact of client portfolios. It is the basis upon which we screen, analyse and manage all portfolios.

We are regulated as investment advisors under the Financial Services Authority in the UK through our subsidiary, The Social Investment Market.

USP
We have a strong background in wealth management and financial product development, an absolute focus on the investor community and a unique methodology for measuring and rating philanthropic portfolios from the perspective of the investor.

Fee
We charge consultancy and portfolio management fees.

- www.investingforgood.co.uk

New Philanthropy Capital

Our service
NPC is a consultancy and think tank dedicated to enabling funders and charities to achieve a greater impact. NPC's clients range from private donors, through to trusts and foundations, professional advisors, businesses and now also charities. Some clients use our consultancy service from start-to-finish – from advice on establishing a foundation to learning more about an issue, selecting grantees, and reviewing their strategy. Others seek our support for specific projects, such as to carry out a charity 'health check' or to get advice on co-funding or giving internationally. We do not provide tax or legal advice.

USP
NPC has the UK's largest research team dedicated to the voluntary sector. We have a ground-breaking framework for analysing charities and our high-quality, independent research covers over 50 issues in the charity sector, from mental health and homelessness to charity mergers and trusteeship. Our team of consultants are uniquely placed to draw on our breadth of knowledge of the charity sector and have built up a wealth of experience over a number of years of working with funders and charities.

Fee
We charge a consultancy fee, calculated on a time and cost basis. NPC is a registered charity and is non-profit.

- www.philanthropycapital.org

Pilotlight

Our service
Pilotlight brings together experienced professionals from the business community and harnesses their talents to drive sustainable growth and development in ambitious small to medium-sized charities and social enterprises. We match individuals with carefully assessed charities and manage them through our unique coaching model. Our aim is to build the capacity of innovative organisations and enable them to make a measurable difference. We map our individuals' philanthropic journey and offer opportunities to learn about the third sector and philanthropy at networking events and workshops.
Our governance workshops include a trustee matching service.

USP
Pilotlight's distinctive mission and highly brokered coaching process differentiates the charity from more traditional pro-bono and volunteer programmes. The calibre of our Pilotlighters (business members) is exceptional and Pilotlight's highly managed process enables them to 'point their brains' at problems and make a real difference to innovative, ambitious organizations. Pilotlighters commit to just three hours a month; Pilotlight ensures their skills make a lasting contribution. Uniquely, Pilotlight evaluates the outcomes of the process, and is able to demonstrate a real and measurable benefit to society at grassroots level.

Fee
Pilotlight offers its services free of charge to charities and social enterprises.

- www.pilotlight.org.uk

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Specialist advisors *continued*

Stewardship

Our service
Stewardship offers a range of tax-effective giving services for clients giving large and small sums. Free technical advice is provided to all, including some tailored at recipients and the responsible management of their funds.

Specialist philanthropic advice is offered on an informal basis, with referrals to appropriate consultants when a more bespoke service is required.

Our approach is valued by Christians who are driven by a biblical understanding of generosity. We also provide a wealth of free educational materials to clients for whom philanthropy is integral to their Christian faith.

USP
Our clients value our mission to promote a biblical understanding of giving and the responsible management of funds. We aim to partner with both givers and recipients, providing impartial advice on all aspects of charitable giving, from the technical through to the spiritual. We are the largest Christian giving agency and distributed almost £50m of funds last year. We work closely with HMRC, Charity Commission and HM Treasury to raise the standards of charitable giving in the UK, particularly from the UK Christian community.

Fee
We currently have no fixed fees for philanthropic services, but the fees for our giving services are competitive (as at Sept 2009).

Giving Account 3% of gross payment in.
'Trust' type account 3% of gross payments in (minimum balance of £10,000) or 0.5% for non Gift Aid payments in.
£400 fee cap per payment in.

www.stewardship.org.uk

The Trust Partnership

Our service
From registration through to administration The Trust Partnership manages the daily running of large and small grant making organisations. Providing secretariat services for trustees we administer the entire meeting process and ensure compliance with governance issues and policies. By managing the grant making process, from application to distribution of funds and review of policies, we alleviate the burden for trustees.

Specialising in community relations and CSR, The Trust Partnership provides businesses with practical advice on implementing positive community and employee engagement programmes. We administer both internal and external donations and in-kind support to assist our clients in proactively contributing to the communities in which they operate.

USP
Taking an holistic view of philanthropy The Trust Partnership is able to offer advice and practical support to both corporate entities and new or established foundations.

Our approach is flexible which enables us to offer bespoke services to each of our 30 client organizations.

We offer all of the services that new or established philanthropic individuals or organisations might need.

Fee
Due to the flexibility of our services, fees are structured on the client's requirements and the complexity of their needs.

http://thetrustpartnership.com/index.php?ID=149

Theresa Lloyd Associates

Our service
Theresa Lloyd Associates' philanthropy advisory services provides confidential and bespoke advice to individuals and families seeking to develop or review a strategy for their philanthropy which reflects their values, passions and desire for effective engagement.

Theresa Lloyd has advised a range of organisations, from new charities to major national institutions, on developing and nurturing relationships with major donors. She understands the concerns of non-profit organisations about what they see as inappropriate intervention, and how the legitimate desire for involvement and effective impact assessment on the part of donors can be met in a spirit of mutual respect and shared commitment to the vision and mission of the organisation.

USP
As a trustee of two small family trusts and with over 20 years' experience in fundraising, I understand both the donor and the beneficiary perspective. I have extensive knowledge of the market gained as a practitioner and as author of ***A Guide to Giving*** (2003), ***Why Rich People Give*** (2004) and ***Cultural Giving*** (2006). I am a trustee of the European Association for Philanthropy & Giving and an advisory board member of Philanthropy UK. I have an extensive professional network and believe in working with others to facilitate change.

Fee
Hourly/daily rate.

www.theresalloyd.co.uk

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Specialist advisors *continued*

Thomson Philanthropy

Our service

Thomson Philanthropy works with donors to improve the effectiveness of their grant making, especially in the education sector.

Thomson Philanthropy supports individual major donors in order to help them set, and achieve, goals for their giving. At the same time striving to ensure that for donors, and their families, philanthropy is an enjoyable and rewarding experience.

Even the most sophisticated grant making foundations may require support in specific areas in order to meet their objectives. With extensive experience in fundraising and in grantmaking, Thomson Philanthropy can examine and address concerns which donor organisations may have regarding the long-term funding sustainability of their grantees.

USP

Thomson Philanthropy exists to enable major donors and grantees to achieve a greater impact. Too often the grant seeking and grant making worlds are detached from one another. With a rare blend of experience from both sides of this relationship, Doug Thomson advises major donors and those seeking to work in partnership with them. Doug works with external teams and individuals to provide a range of services for donors and charitable organisations, usually over an extended period of time.

Fee

Projects are designed and costed on a bespoke basis, using a fee-based daily rate.

▸ www.thomsonphilanthropy.com

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Solicitors

Bates Wells & Braithwaite

Our service
Bates Wells & Braithwaite is a specialist and personally committed firm of solicitors providing a full range of services in relation to charities and social enterprises. We provide expert advice on the establishment of public benefit organisations and project vehicles and the terms of donations, funding agreements and collaborations. We are especially involved in the development of social enterprise and were founders of the idea of the Community Interest Company, which allows for community benefit equity investment. We advise in the context of relevant tax issues and the international dimension and are generally deeply engaged with the public benefit sector.

USP
We are lawyers who have actively chosen to work and enjoy working as specialists for public benefit clients. We recruit very able, committed and loyal solicitors on that basis. We have 30 specialist charity and social enterprise lawyers and the same number again providing particular legal services (employment, property, intellectual property etc) to the same clients. We have clients across the full spectrum of public benefit activity and have a particular focus on innovative projects (for example, Charity Bank, The Fairtrade Foundation and the Eden Project), service-providing social enterprise and the delivery of public services.

Fee
The charges for legal work depend very much on the particular issues. We charge by reference to statutory factors, including the most tangible – time engaged. Each solicitor has a scale of hourly rates for this purpose that are lower for public benefit and for smaller clients. We provide estimates of cost at the outset of and ongoing information during each matter. We can agree particular ways of charging to suit the client and are well used to the necessity of working within constrained budgets.

‣ www.bateswells.co.uk

Farrer & Co

Our service
Farrer & Co advises wealthy individuals, international families and corporate bodies on the setting up, funding and operation of charitable and philanthropic structures. Our service includes setting up giving programmes and funding arrangements, good governance, tax and investment structures.

USP
Farrer & Co has enormous experience and a long tradition of advising wealthy individuals and of operating in the philanthropic and charitable sector. We provide a holistic and integrated approach to all aspects of structured philanthropy and have a deep understanding of the wider charitable and voluntary sector which we feel is a pre-requisite in providing philanthropy services.

We have also advised on a number of cutting-edge social investments as well as philanthropic financial products and giving structures.

Fee
We discuss fee structures with clients at the outset and will generally charge at our standard hourly rates unless fixed or capped fee arrangements are put in place.

‣ www.farrer.co.uk

Maurice Turnor Gardner

Our service
We have unparalleled expertise in the provision of creative technical advice on innovative cross-border charitable structures and the development of sophisticated financial products for the charitable sector. We also provide advice on traditional charity law and philanthropic matters and sophisticated tax advice.

We have a unique practice specialising in chartered corporations, and our clients in this sector include many of the best known professional institutes, universities and other institutions established by Royal Charter.

USP
Our philanthropy advisors bring expertise in commercial and cross-border matters gained when we were the private client team at leading international commercial law firm Allen & Overy LLP. Our continuing association with Allen & Overy LLP enables us to draw on expertise in corporate, regulatory and banking advice.

Fee
Our fees are very much dependent on the nature of the transaction. We adopt a flexible, case-by-case basis approach to our fee structure and sometimes agree a fixed fee for a particular matter. On other occasions, we charge hourly rates which we believe are highly competitive in the marketplace.

‣ www.mauriceturnorgardner.com

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Solicitors *continued*

Withers

Our service
Withers advises both donors and those seeking to raise funds on the tax efficient structuring of charitable donations (often internationally) and the creation of appropriate vehicles to be used as family foundations (or operating charities). It provides a full range of legal services to individual and institutional clients.

USP
We have the largest private client practice of any law firm in the world and also advise many well-known charities. Our understanding of high net worth individuals and of charities gives us an awareness of donors' philanthropic aspirations and what is possible. We provide our services on a cross-border basis.

Fee
Fees are generally charged on a time cost basis.

▸ www.withersworldwide.com

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Wealth advisors

Barclays Wealth

Our service
Barclays Wealth Client Philanthropy Service is very personal and carried out on a one-to-one basis, with the client's banker very much part of the process.

We can help with the following as well as utilise the skills of our third party advisors:

Identifying the right structure
Guidance on the right giving structure
Advice on practical, flexible and effective giving

Achieving the desired effect
Identifying the right cause area/s
Deciding extent and profile of involvement

Involving the family
Engaging the family
Creating a inter-generational legacy

Developing their vision
Inspirational learning through events and specialised literature

Networking
Opportunities to meet other philanthropists and experts in the field.

USP
Our philanthropy service plays an integral part of our private bank by engaging, educating and supporting clients – and their families – in their personal giving journey. Our in-house advisor has 22 years' sector experience in the philanthropic field.

Fee
No fee is charged and all outsourced service fees are arranged between client and advisor.

▸ www.barclayswealth.com

Coutts & Co

Our service
Our advice is based on our experience of working with major donors and collaborating with specialist organisations.

We facilitate one-to-one consultations to understand clients' motivations and values, and strategy workshops to help them develop a common vision. We research causes and identify the criteria for selecting charities. We can help donors establish guiding principles, goals, and a process for reaching a decision. We help select charities, review grant applications, conduct site visits, monitor impact of donations and meet other donors through the Coutts Forums for Philanthropy.

Coutts is piloting two donor advised funds focussing on Microfinance and the Environment, where clients pool resources.

USP
We have experience of working with a wide range of clients from around the UK and overseas, with different backgrounds, supporting different causes in different ways. Key to our unique service is the depth of advice we provide and the breadth of our service. As a bank, we have a reputable track record of offering trusted advice, coupled with an innovative approach. This includes pioneering the offering of philanthropy services by a private bank in the UK in 2005.

Fee
Coutts does not charge for general one-off philanthropy advice. We only charge for bespoke advice if agreed with the client first. For private charitable trusts, fees charged depend on the size of the trust, time spent and responsibilities undertaken.

For managing charity investments, the fees levied will depend on the nature and scope of the service required, the complexity and size of the mandate.

▸ www.coutts.co.uk/philanthropy

JP Morgan Private Bank

Our service
Our approach is to always be led by the client, their needs and interests. We will provide the level of service that is required – where appropriate pulling in our colleagues in the Private Bank in the US who have a substantial and long-established philanthropic services team, as well as our colleagues who manage the bank's own philanthropic endeavours.

USP
We integrate our philanthropic advice with investment management and more general wealth advice. Our dedicated philanthropy advisor in the UK has experience of practising as a charity lawyer and legal adviser to philanthropic individuals, of setting up and running a charity in the UK and acting as a trustee of a grant-making foundation and two operating charities.

Fee
This service is provided as part of our overall service to clients and so we do not charge separate fees – although our partners do charge for services and we agree these with clients.

▸ www.jpmorgan.com

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Wealth advisors *continued*

Spencer-Churchill Miller Philanthropy

Our service

Spencer-Churchill Miller Philanthropy is a grant making charity. Grants will be made to charities and non-charities – individuals and projects – judged as deserving by the trustees. The recipients will be mostly in the UK but not exclusively as we believe charity begins at home. Approximately 40% of funds will be allocated to environmental issues causes, with the remaining 60% granted to charities/voluntary bodies, individuals and projects.

The trustees will hold the funds in trust in a separate savings account. No monies waiting to be granted will be invested in any investment vehicle.

USP

Our entrepreneurial approach means we are willing to be contrarian in every respect; the fund raising events we host, fiscal accountability, stewardship and awarding grants.

The team at SCM Philanthropy is socially and financially fortunate and is in a position to use their considerable contacts with philanthropists to leverage substantial funds. As a grant making foundation our target will not be charity household names, but a lower tier of charities, individuals and projects that undertake extraordinary works but are not adept at fund raising, business or administration. It is a natural extension to our business philosophy and values.

Fee

We do not charge fees for any of our services, all donors are treated the same and receive the same high levels of communications, evaluation updates, networking opportunities and access to charitable causes we have identified as grantees.

▸ www.scmprivate.com

Standard Chartered Private Bank

Our service

Standard Chartered Private Bank believes that with wealth comes responsibility. Its comprehensive philanthropy programme *Investing for a Better Future* offers clients a three-pillared programme, aimed at making giving easier and more meaningful:

Seeing is Believing – clients can co-invest with us to fund projects through the Bank's *Seeing is Believing* global campaign. They can donate directly or through a tailored deposit account which allows the credit interest to be automatically transferred. Every dollar donated is matched by Standard Chartered Bank (up to $20m).

Advisory Services – providing bespoke strategic philanthropic advice from experts.

Education and Involvement – Clients are able to experience voluntary internships with the Bank's partner charities.

USP

'*Investing for a Better Future'* is different, because we partner with clients, through the Seeing is Believing (SiB) and Education and Involvement pillars. Having diverse options makes giving easier, for example, through the automatic transfer of credit interest to fund an SiB eye project, and more meaningful, through matching contributions to SiB. Our programme demystifies philanthropy – it should be simple, it should be about giving money or time, large or small. Our programme does just that. Together with our clients, Standard Chartered Private Bank aims to fund three SiB projects over five years. We will make a collective difference.

Fee

Our multi-faceted and tailored approach to addressing our clients' philanthropic needs means there is no set fee structure. There is no cost for some elements whereas there will be for creating a bespoke giving strategy. Philanthropy is personal.

▸ www.standardchartered.com

Stonehage Philanthropy Services

Our service

Stonehage Philanthropy Services focuses on individual giving, family philanthropy and social investing.

Individual giving: core services include clarifying philanthropic vision and goals, project selection and basic due diligence in core markets, governance and administration, grant making services and investment management.

Family philanthropy: core services include facilitating the development of a Family Philanthropy Vision and establishing a Philanthropy Committee in the context of a Family Constitution.

Social investing: works with a network of preferred service providers within a holistic return framework to accommodate both financial and social objectives.

USP

SPS provides a professional framework for connected giving.

Fee

Our initial meeting is not charged. Thereafter, fees are generally time-based and set at a 20% discount to normal charge-out rates.

▸ www.stonehage.com

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International advisors

Active Philanthropy (Germany)

Our service
Active Philanthropy aims to be a one-stop-shop for all questions donors have on their way to becoming an active and effective philanthropist and to help them develop a tailor-made strategy for giving back.

Our aim is to encourage an engaged, active approach to philanthropy throughout Europe because we are convinced that donors can create an impact not just by contributing financial resources but also with their professional experience, time and contacts.

Active Philanthropy works with multi-generational families with an entrepreneurial background and philanthropic tradition. Services especially tailored to the next generation help to pass on family values and traditions and to involve the next generation in philanthropy very early, thus fostering inter-generational exchange and understanding within a family.

USP
We have a clear focus on families and individuals from entrepreneurial/business owning families. We are independent from any bank, asset management company or similar organisation. Building on interactive, innovative learning experiences, our approach focuses on learning from peers, in the field, and on showing that giving can be fun and personally enriching.

Fee
Written materials/resources are free of charge or at a low symbolic charge. For workshops and expeditions participants pay direct costs or according to the model *'pay whatever you think it has been worth to you'*.

Individual advice is charged on a per-project basis.

▸ www.activephilanthropy.org

King Baudouin Foundation (Belgium)

Our service
The King Baudouin Foundation gives advice to donors and intermediaries on the most efficient way to use a donor's assets to achieve a social purpose.

As philanthropy is a very special discipline, the Centre takes the time to listen to donors, to study their ideas in terms of philanthropy and to provide professional advice. Over the last 30 years, we have built up a huge fund of experience in philanthropy as well as in civil initiatives. The vast international network of the King Baudouin Foundation also represents an enormous asset for our Philanthropy Centre.

In 2007 the British magazine *Euromoney* awarded the prize to the King Baudouin Foundation for the 'best philanthropy consultant in Belgium and Western Europe'.

USP
We have a unique reputation and an excellent track record of helping donors achieve their philanthropic goals. This experience engenders trust in new donors; KBF's advisory service grew out of a demand by donors impressed by our foundation work. We take a donor-centric approach.

Fee
For initiatives managed by the KBF, we cover costs.

For example, we charge a management fee of 0.8% of the capital of a fund (so a fund of 100,000 euros would cost 800 euros in management fees). For donor supported funds (without capital) we charge 5% of the amount of grants.

We charge a flat fee to cover costs for services such as organising a call for projects, conducting research or fundraising.

We do not charge for connecting clients with other organisations.

▸ www.kbs-frb.be

Philanthropy Ireland (Ireland)

Our service
We offer very general guidance for current and prospective philanthropists, including the types of giving options that are available to them and where they can find information about which organisations to support.

USP
Our unique selling point is a 26-strong membership of organisations with different areas of expertise and approaches to philanthropy. Our members have helped us secure leading advocates to brief our members on key policy issues and to identify and distribute relevant research and guidance, meaning that smaller philanthropies are able to access leading minds in their programme areas and in philanthropy more generally.

Fee
We occasionally charge fees for training events, but these are set so as to cover the cost of the event, not a profit-making venture for our organisation.

▸ http://philanthropy.ie

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International advisors *continued*

Rockefeller Philanthropy Advisors (US)

Our service

With a staff of 40 in three offices (four as of October 2009), Rockefeller Philanthropy Advisors provides both project and ongoing support to donors.

Rockefeller Philanthropy Advisors' work is based on three factors: our mission-driven approach; our analytical capacity; and our experience with a broad range of philanthropic programmes. The mission of Rockefeller Philanthropy Advisors is to help donors create thoughtful, effective philanthropy throughout the world. Our size and depth gives us significant capacity both in planning and implementation as we draw on the complete range of resources as well as the expertise of the project team.

USP

We represent the cumulative wisdom and knowledge of more than 100 years of philanthropy. Our senior staff have deep knowledge and experience in all major areas of giving. We have a global reach, serving donors in North America, Europe and Asia. In 2008, we advised on or facilitated $170m in giving to 30 countries.

Fee

Since all our work is highly-customized, our fee structure is also highly variable. Depending on the engagement, we may charge based on a per-diem rate, a flat fee, a retainer or as a percentage of the grants we are managing.

▸ http://rockpa.org

Tactical Philanthropy Advisors (US)

Our service

Tactical Philanthropy Advisors is a full-service advisory firm. We serve high net worth donors with between $1m and $50m or more in philanthropic assets. Our services include setup, administration, and ongoing advice for private foundations and donor advised funds. We also provide services for wealth managers, estate planners, CPAs and family offices to help them better serve their clients' philanthropic needs.

We have created working arrangements with Fidelity Charitable Gift Fund®, Schwab Charitable, Calvert Giving Fund and Foundation Source to provide robust, institutional quality back office, administrative services to our clients.

USP

At Tactical Philanthropy Advisors, our services are delivered by an experienced advisor who is focused on building a relationship with each client. Our fees are based on a percentage of philanthropic assets under advisement, which means that rather than simply delivering discreet answers to your questions, we are incentivized to deliver a complete, personalized, high-touch advisory experience. Our minimum account size of $1m means that we work exclusively with high net worth clients. We provide a level of service unmatched by organisations with much lower minimums.

Fee

We have a single fee structure based on assets under advisement. All clients have access to all of our services under this agreement.

▸ www.tacticalphilanthropy.com

The Philanthropic Initiative (US)

Our service

The Philanthropic Initiative is a non-profit working across the globe to advance the field of strategic philanthropy and advise the most ambitious family, foundation and corporate donors in their quest for deep impact on the pressing issues of our times.

Twenty years since our founding, we continue to conduct vital research, convene diverse voices, and train others in effective giving's best practices. Our advising work runs the spectrum from strategy and governance to programme design, implementation and evaluation – and includes every aspect of training and education that you would expect from one of the most established names in strategic philanthropy.

USP

The Philanthropic Initiative, Inc. works with ambitious donors who, regardless of their experience or skill level, strive for deep and sustained impact on the critical issues facing society. With two decades at the forefront of the field, TPI has the creative thinking, the network of experts, and the track record of success to ensure change will be realised.

Fee

TPI is social business which relies on its philanthropy advising revenue to fulfill its mission. We charge for time completed at standard and discounted daily rates that range from $1,600 to $2,400 depending on team member and assignment.

▸ www.tpi.org

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International advisors *continued*

VALUEworks (Switzerland)

Our service
VALUEworks is a fully independent family office, located in Zurich, the financial heart of Switzerland.

Our goal is to provide a personal, premium quality service to international families, individuals and charities and to build lasting relationships with them as their trusted advisor.

Our professional team knows its customers, their needs, wishes, ideas and beliefs and offers a high level of technical knowledge to create state-of-the-art solutions for them.

We can offer structural support, international and Swiss legal and tax advice, fiduciary and book-keeping services and can supervise wealth management and banking matters.

We have built a global network of selected experts and advisors to implement the best possible solutions for clients.

USP
We offer philanthropy advice as an integral part of our personalised estate planning services for wealthy international families. We accompany and coach our clients in their philanthropy interests and develop their individual giving strategy which reflects their personal values. We advise on charity structures, establish and manage charitable trusts, foundations or endowment funds. Amongst other services we undertake specific research into charities to assist clients in their choice over which ones to support and monitor these charities accordingly.

Fee
No advice fees, and reduced fees for further general administrative and charity services. Fees are charged for special projects such as structuring or founding a charity.

▸ www.valueworks.ch

wise (Switzerland)

Our service
We support donors and their families in fulfilling their philanthropic aspirations through three core elements:

- A tailor-made approach: We offer personalised, confidential and tailored services. wise's experience in social action enables us to guide and assist donors throughout their engagement. Seeking to strategically create change, we want our donors to have a meaningful and enjoyable giving experience.
- Added value for partner organisations: We provide planning and management tools alongside professional insight to increase impact.wise takes a non-bureaucratic and highly focused approach.
- Independence: central to wise's identity, is our intention to stay independent from banks, while regularly working with them. We personally visit and evaluate organisations we recommend.

USP
We are an independent philanthropy advice firm with a self-generating business model; we do not rely on grant funding and no more than 20% of business revenue comes from any one client. We have numerous families and individual donors involved in 23 ventures and have impacted the lives of 1.2 bn people by the end of 2008. We have good networks and are open about the services we offer, and those we can offer in partnership with other organisations.

Fee
We are fee-based and charge by the hour or set packages and not directly in relation to the amount of the donations.

▸ www.wise.net

About Philanthropy UK

Philanthropy UK is the leading resource for free and impartial advice to aspiring philanthropists who want to give effectively. We develop and share current information and best practice on giving, provide accessible links to specialists, and aim to inspire more people to become philanthropic and so enjoy the extraordinary rewards this brings. We publish the *Philanthropy UK Newsletter*, the leading publication on British philanthropy read in over 70 countries around the globe, and *A Guide to Giving*, the essential handbook for philanthropists.

An initiative of the Association of Charitable Foundations (ACF), Philanthropy UK was founded in 2001 and is supported by a range of charitable foundations with funding from the Cabinet Office.

Visit www.philanthropyuk.org

philanthropy|uk

Giving advice: *a guide for philanthropy advisors* is a new website that provides a comprehensive 'one-stop' guide for private client advisors to more effectively support their clients' philanthropic aims.

Developed by Philanthropy UK and The Society of Trust and Estate Practitioners (STEP), two of the UK's leading providers of philanthropy advice, it offers essential information in one place.

The step-by-step guide includes a framework for advising clients on philanthropy, case studies and key questions and answers, with signposts to more detailed information and other helpful resources.

It is designed to support private client advisors of all types – encompassing a wide range of individuals and firms, including private bankers, wealth managers, trust and estate lawyers, accountants, trust and family office managers, financial planners, and family business consultants.

Visit www.givingadvice.org.uk

Quick guide to philanthropy advisors

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