

Philanthropic Advisory Services



DISCOVER

Develop a compelling vision statement

Understand generational differences and commonalities

Learn about local needs and opportunities



CREATE

Receive customized research report on areas/issues of interest

Develop a philanthropic plan using a mix of strategies

Link your plan to networks and learning opportunities



SUSTAIN

Develop a succession plan to engage next generations

Explore ways to leverage your philanthropic impact



IMPLEMENT

Receive professional back-office support, for example: grants administration, impact/ROI analysis

Utilize project management services to maximize efficiency

HEIRLOOM

THE PHILANTHROPIC CHAIR AT YOUR TABLE™

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