



# Philanthropy Services

## Background

Making a lasting impact on society is one of the greatest goals in life. Our Philanthropy Services help you to approach the objective of improving the quality of life for less privileged people, society at large or the environment in a professional manner. Depending on your resources and interests, you define the type of engagement, the key objectives and your personal involvement or that of family members and friends. Philanthropic endeavors frequently involve descendants and hence increase the bond between generations.

Within a strategic plan you define who should benefit, how much you intend to give and which organization will support you in reaching your objectives. It is your decision whether to give to existing organizations or to start a charitable platform yourself.

## What are your benefits?

- Overview of the spectrum to be active in charity
- Process to define purpose of giving and financial planning
- Structure and processes for day-to-day execution according to your intentions

## What do you get?

### Planning

- Formulate the purpose of the activities and financial boundaries
- Support the preparation of a financial plan for investments and commitments
- Identification of potential partners

### Implementation

- Define governance and prepare necessary legal structures
- Mandate and monitor external partners
- Reporting of expenses and results (within overall wealth reporting)

### Engagement types

- Donations to charitable foundations and non-profit organizations
- Investments in social enterprises or respective funds
- Conducting own projects to support a specific purpose

### External partners

- Identify organizations and projects that fit into your strategy
- Provide due diligence on organizations and projects
- Monitoring of achievements, as well as prudent management of resources

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