



# PHILANTHROPIC SERVICES



PhilanthropyRoundtable

## MISSION

Philanthropic Services provides resources, education, practical guidance, and individual consultation on best practices to ensure donors' principles and priorities are protected, and promotes sound governance, management, and operations.

## GUIDING PRINCIPLES



We believe that respect for donor intent is essential to philanthropic integrity.



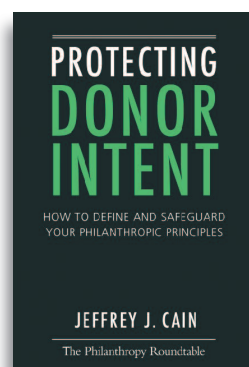
We are committed to preserving, strengthening, and celebrating the principle of donor intent.



We likewise believe that it is a core responsibility of those entrusted with disbursing charitable assets to dispose of them in a manner consistent with the wishes of the original benefactor.

## PRODUCTS AND SERVICES

- ▶ Coming in 2019: an updated and enhanced guidebook on donor intent. The new edition will include greater guidance on the relative advantages and disadvantages of sunseting versus perpetuity, practical governance issues of corporate versus trust structure, and how to protect donor intent when utilizing donor-advised funds. This second edition will also include additional chapters on the special donor intent challenges of endowment gifts and giving to universities and what to do when things go wrong.
- ▶ Convenes successful individuals to discuss their thinking on donor intent and share their insight with donor peers
- ▶ Provides presentations on donor intent, governance, and management at The Philanthropy Roundtable's Annual Meeting and designs such sessions for other meetings of foundations and philanthropic donors
- ▶ Provides customized individual consultation
- ▶ Publishes a wide range of materials, from practical, how-to guides for living donors to principled justifications of donor intent



Visit [PhilanthropyRoundtable.org/services](http://PhilanthropyRoundtable.org/services) for timely articles from *Philanthropy* magazine or to request a copy of one of our guidebooks.



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## AREAS OF EXPERTISE

- ▶ Donor intent
- ▶ Foundation governance and management
- ▶ Sunsetting vs perpetuity
- ▶ Family foundations
- ▶ Mission statements
- ▶ Choosing board members and staff
- ▶ Donor-advised funds and other philanthropic vehicles

## TESTIMONIAL

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Philanthropy is a complex endeavor and it requires much more than good intentions and money. The Philanthropy Roundtable has given our foundation a better understanding of the philosophy of philanthropy. We are fortunate such an organization exists to serve us.

— Phyllis Taylor, Patrick F. Taylor Foundation

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## ROUNDTABLE EXPERTS AT YOUR SERVICE

Joanne Florino serves as The Philanthropy Roundtable's vice president of philanthropic services. In this role, Joanne directs our programming and services in donor intent, foundation governance and management, and best practices in philanthropy. Contact Joanne to take the next step in protecting your donor intent.



### Joanne Florino

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