

Foundation & Philanthropy Services



Philanthropic Giving

We support individual and family donors

- Donor Advised Fund distributions
- Donation tracking and reporting
- Initial research and due diligence



Foundation & Family Accounting

- Grant payments and donations
- Accounting and financial reporting specific to philanthropic goals, including program-related investments, impact investing, charitable trusts, and other complex assets
- Tax prep and CPA support



Grants Management

- Grant cycle management
- Charitable budgeting and disbursement tracking
- Compliance and tracking (including Form 990 and IRS tax-exempt letter review, follow-up reports, expenditure responsibility reports, and other grant requirements)



Program Officer

- Grant research and initial due diligence
- Point of contact for grantees, board members, staff, and other stakeholders
- Board administration and communication (including dockets and newsletters)

To learn more about how we can help, contact:

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