

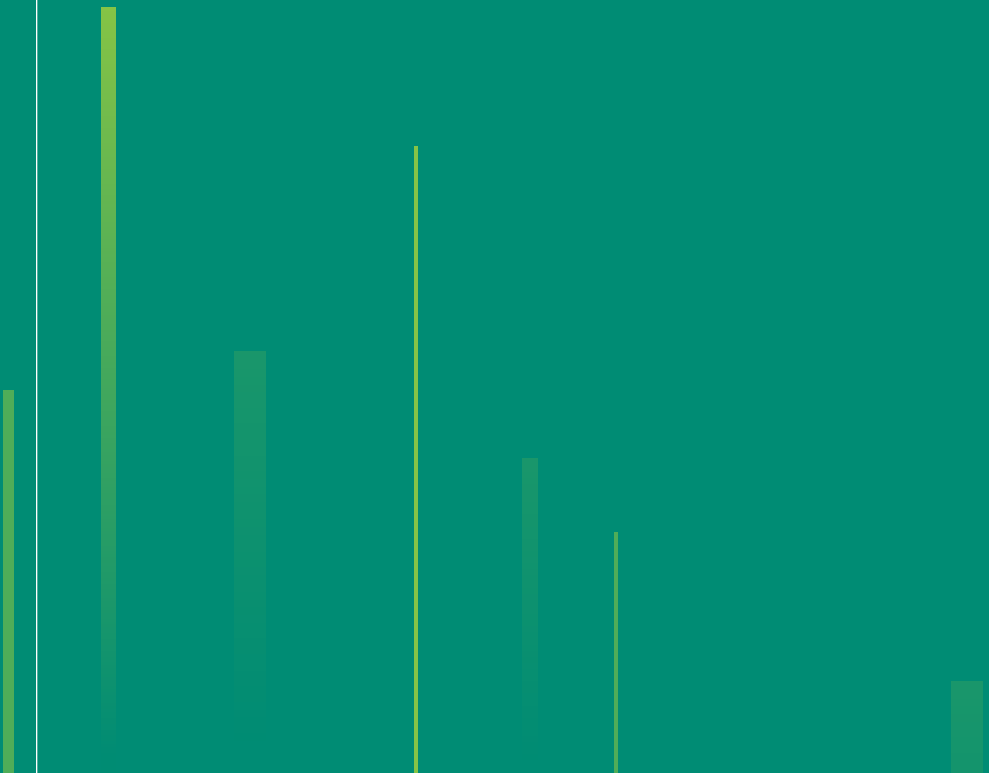
William Blair

Private Wealth Management

Philanthropy Strategy Services



Through dedicated partnership and expertise, we can help you develop deliberate, high-impact charitable strategies to optimize your philanthropy investments.



Our Services

William Blair offers custom and personalized services to individuals, business owners and entrepreneurs, family offices, corporations, and nonprofits to establish and strengthen their philanthropic purpose.

Investing Your Philanthropic Assets for Good

In our experience, there are three main catalysts to initiating or reviewing your philanthropy strategy. Whether you are reexamining or revitalizing your existing philanthropic efforts, introducing a new generation to your vision, or inspired to begin your journey by a liquidity event, William Blair brings decades of expertise to help you accomplish your goals, such as:

- Developing the purpose, mission, vision, and values for your philanthropic capital
- Creating a sound and durable investment policy
- Instituting efficient and structured governance and operations
- Designing world-class grant-making programs and processes
- Building powerful partnerships and relationships

- Defining and measuring toward meaningful outcomes and impact
- Incorporating environmental, social, and governance (ESG) priorities into your asset and portfolio management
- Aligning your charitable values to the value of your charitable assets

We are equipped to advise on everything from the initiation to the evolution of your philanthropic plans within the context of your comprehensive wealth management and estate planning structure, including managing:

- Donor-advised funds
- Private family foundations
- Charitable trusts
- LLCs and integrated for-profit and nonprofit fund models
- Program-related investments, mission-related investments, and recoverable grants

Our Approach

It begins with personalized conversations as we work to articulate and define the purpose of your capital and your philanthropic mission.

Family Philanthropic Strategies and Partnership

From that discussion, we begin to build strategies and create an infrastructure for long-term success. Once a solid foundation is built or revisited, we continue to serve in an advisory capacity on every step of your philanthropic journey, providing guidance and expertise on grant-making, relationship building, networking, best practices, thought leadership, and expertise on broad and personalized trends in giving.

As your main point of contact and confidante, we work closely with your William Blair advisor, our wealth planning team, and your tax and legal advisors to guide your tax-efficient charitable vehicles—such as private foundations, charitable trusts, LLCs, and donor-advised funds. By employing a strategic approach to giving, we help you maximize the impact of your charitable efforts on both your financial and social priorities.



Our Approach (continued)

Building Your Philanthropic Roadmap

Our dedicated philanthropy strategy advisor consults with you and collaborates on an integrated plan to optimally support each of your philanthropic endeavors. Examples of our work include:

- Developing your philanthropic mission, vision, and values
- Designing a multiyear philanthropic plan and roadmap
- Working with third-party philanthropic partners to facilitate grant-making
- Engaging the next generation
- Creating multigeneration philanthropy goals and education
- Hosting family meetings, board meetings, family volunteerism, and community site visits
- Implementing foundation management disciplines
- Providing research, best practices, networking opportunities, and trends on issue areas
- Identifying and developing innovative approaches to effective grant-making
- Starting ESG initiatives and impact investing
- Optimizing tax strategies
- Providing comprehensive investment advisory services

Your Lasting Legacy

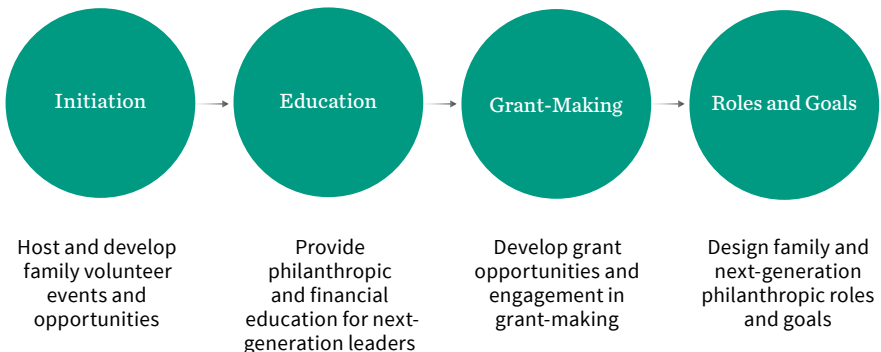
Making sure your family’s philanthropic legacy is maintained and strengthened across multiple generations requires a thoughtful approach.

We work as your trusted advisor to build philanthropic strategies that are integrated into your time horizon, vision for engagement, and long-term goals. While children and grandchildren often have a natural interest in the family’s charitable endeavors, making sure that the family’s philanthropic mission is maintained and strengthened across multiple generations is an important step to building your legacy.

Whether you will sunset or aim to grow your philanthropic strategy in perpetuity, we examine best practices for engaging independent board members, teaching younger generations about philanthropy, and engaging next-generation leadership in your family’s charitable activities.

EXHIBIT 1

Best Practices for Maintaining Philanthropic Legacy



Working With William Blair: Case Study



William Blair engaged in a new relationship to help a family optimize financial assets post-liquidity and establish two philanthropic vehicles—a donor-advised fund and a family foundation—with combined charitable assets of over \$400 million.

Our team partnered to build the governance, operations, timeline, focus areas, and processes for initiating and executing the family's philanthropy strategy.

We continue to serve as an ongoing trusted advisor in building charitable programs and partnerships and provide benchmarking and networking. Our experts also custom built an all-impact portfolio to incorporate values-based investing in both personal and philanthropic assets under management. As a result, we have become an integral advisor to this family's asset management and philanthropy strategy and implementation.

Additional Services and Support

In addition to our work with families, William Blair extends its expertise to advance corporate and nonprofit philanthropy and capacity building. We support our corporate and nonprofit clients through:

Nonprofits and Charities

Our firm is dedicated to helping charities achieve social and financial returns. We are proud to partner with community nonprofits by:

- **High-impact Fundraising Strategies:** From annual funds to capital campaign development, your William Blair team will advise on how to best build plans and capital to support your mission.
- **Planned Giving Programs:** Your advisor will review, assess, and guide planned giving, estate planning, and endowment building for long-term fiscal goals.
- **Investment Policy:** William Blair will work with your board and leadership to assess, build, and evolve your investment policy purpose and statements, in addition to working with your boards on capacity building and their fiduciary responsibilities and expertise.
- **Subject Matter Expertise:** As a funder of global philanthropy initiatives, William Blair shares its direct program knowledge on trends in philanthropy.
- **Leadership and Succession:** We will guide you in identifying, training, and integrating successive board members with a focus on preserving your institution's legacy and value.
- **Strategic Asset Allocation and Management:** From cash flow to portfolio sustainability, we provide strategic asset allocation and management of customized portfolios.

Additional Services and Support (continued)

Corporate and Executive Leaders

William Blair assists businesses and executives in developing philanthropy programs. We provide expertise in:

- Advising on corporate philanthropy vehicles and strategies
- Building signature grants programs
- Devising employee engagement programs
- Benchmarking on budgets
- Networking with like-minded corporate leaders
- Perspectives on corporate social responsibility and ESG initiatives

Research and Perspectives

William Blair offers investment and philanthropy research and perspectives. Through industry partnerships, insights, and thought leadership from internal and external sources, we aim to provide you the necessary resources. Our experts offer thematic insights and diligent research, delivered both internally and externally.



William Blair's Dedication to Philanthropy

An important part of the William Blair mission is to engage with and actively invest in the communities where we live and work.

Engaging in Our Communities: Making a Difference Around the Globe

Each year, our firm supports nearly 1,000 charities through firm grants, sponsorships, and employee matching gifts programs.

Nearly 400 William Blair colleagues serve in leadership roles on nonprofit boards. The firm provides up to 11,500 USD per year in employee matching gift programs to charitable organizations worldwide, offers one annual paid day off to volunteer, and offers a volunteer grants program. Around the globe, employees volunteer and support food banks, environmental programs, and youth and educational organizations. Our employees collect coats for Wrap Up London, support social service programing in Zurich, and sponsor an annual youth art competition in Frankfurt to celebrate the legacy of Anne Frank.

We are also proud of our signature Global Community Partners program, through which employees nominate organizations to receive catalytic financial support and significant human capital volunteerism opportunities. Since this program's inception, William Blair has donated more than \$4 million to charitable organizations in the communities where we live and work.

Trusted and Proven Partners

Across all aspects of our firm, we are leveraging and sharing best practices in philanthropy, employee engagement, DEI, sustainability, and strong governance, reflective of our values and our commitment to partner with clients on high-impact philanthropy and engagement in our local communities.

Contact

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January 2024

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