

The Power of Philanthropy

– Development Officer

Presented to:

August 21, 2019




WHO WE ARE AND WHAT WE DO

HOW WE WORK WITH YOU AND YOUR CLIENTS

THINGS TO CONSIDER

CHARITABLE GIVING STRATEGIES AND TOOLS



Who is the Pittsburgh Foundation?

- Local Community Foundation for 75 years
- \$1.2 B under asset management
- Over 2,500 component funds
 - Donor-advised, scholarship, designated
- 2018: granted \$48 M back into the Pittsburgh community

What kind of client should you be looking for?



- Already charitably inclined
- Possibly looking for deeper charitable connection
- Single or married with no kids
- 70.5 or older – IRA QCD
- Would benefit from utilizing our suite of donor services
- Weighing different giving options
- Wants to leave a legacy for family

When do clients give?

Give now

- Enjoy philanthropy during lifetime
- Cash/check or online
- Stock transfer

Give over time

- Grant money to charities of choice
- DAF's
- Give as a family; next gen involvement
- Engage around something meaningful

Give at death

- Leave a legacy
- Bequests
- Beneficiaries

Charitable Tools: Private Foundations, DAF's, directly to charity – what's the difference?

Things to consider

- Type and timing of asset being used
- Who do they want to involve in giving
- What are their investment goals associated with the charitable asset
- What level of privacy does the client want (if any) and who can provide that

Spotting Opportunities: Third Party Investment Manager Program

Continued management of charitable asset

Deeper connection to client through philanthropy

Strengthen ties to next generation

Spotting Opportunities: AUM vs. AUR

Generational succession

Ensuring your practice

Engaging through grief (loss of a spouse/partner)

Deeper conversations



Leaving a Legacy



What's my next step?

THE POWER TO START TODAY

Amy B. Razem

Development Officer

412.394-4291

razema@pghfdn.org

