

FOUNDATIONSOURCE

Where Experts Go For Expertise



PHILANTHROPIC SPECIALISTS TO HELP FOSTER
HOLISTIC CLIENT RELATIONSHIPS

As high-net-worth individuals strive to make their passion for changing the world a reality through charitable giving, they need help from the professionals they trust – attorneys and accountants with whom they have built relationships over the years. You know your clients better than anyone. And they trust you to help them answer questions about starting a new private foundation or about the foundations they already have.

When these questions fall outside your practice area, Foundation Source is ready to help. We offer a configurable suite of administrative, compliance, advisory and technology solutions, and our in-house tax and legal teams are well-versed in the rules governing private foundations and ready for consultation about the issues affecting your clients. And that’s exactly who they remain – your clients.

We’re a resource for experts like you, not a competitor.

Why Choose Us? THE NUMBERS SAY IT ALL:



98%
client
retention
rate

20+ years
of foundation
expertise

380,000+
grants and
\$8+ billion
in charitable aid

2,000+
network
of private
foundations

\$21+ billion
in foundation
endowment
assets

From Data To Insights To Expertise /

In addition to serving as the trusted partner for philanthropic foundations since 2000, we have collected and analyzed transaction-based data so we can provide timely, quantitative benchmarks for both foundations and the professionals that support them. This data helps our partners work more effectively with their philanthropically-inclined clients to magnify their impact.

Our most recent study, the [2022 Report on Private Philanthropy](#),* analyzed data from nearly 1,000 foundations and found that:

- Private foundations increased their giving in 2021, with the foundations in our study collectively granting \$689 million, or \$40 million more than in 2020.
- As we've observed in prior years, foundations of all sizes granted more than their annual mandatory distribution requirement of 5% in 2021, with smaller foundations giving nearly twice that (8.9%).
- Private foundation endowments experienced double-digit growth in both 2020 and 2021.
- While foundations gave more dollars year-over-year in 2021, they made 500 fewer grants (30,470) than in 2020, suggesting a move from urgently helping as many recipients as possible to making a more concentrated impact.

* Please refer to the full report for a description of the research methodology.

A TRACK HISTORY OF TRUST:

We have a 20+ year history of working with attorneys, accountants, and other professionals that operate within the HNW ecosystem, building strong partnerships to help deliver holistic service to your most valued client relationships. We're proud of the trust we have cultivated and cherish the experiences of clients like Fred Sievert, President of The Sievert Family Foundation who said:

"Initially, I resisted setting up a private foundation, but Foundation Source has made this not only a relatively effortless process, but also a very enjoyable one. I am grateful that Foundation Source has served a vital role in facilitating the Sievert family legacy."

At Foundation Source, we're proud to be the resource experts like you turn to for trusted expertise. Let us know how we can help you. To learn more, call 800.839.0054 or send us an email at info@foundationsource.com.

www.foundationsource.com