

**YOU KNOW  
YOUR CLIENTS.**

**We Know  
Philanthropy.**

Your HNW clients trust you to help them with their estate planning goals. And when those goals include philanthropy, you can trust us to serve as your expert resource. We're on-hand when you need us for questions that fall outside your practice area, and we offer a configurable suite of administrative, compliance, advisory and technology solutions purpose-built for private philanthropists and their foundations.

#### WHY WORK WITH US?

98% client satisfaction rating

20+ years of foundation expertise

~530K in grants

~\$12 billion in charitable aid

2,000+ network of private foundations

12K+ advisor relationships

\$22 billion in foundation endowment assets

\*Data as of 05/31/24.

#### Want to learn more?

See what specialists like you have to say about the benefits of private foundations. Visit [foundationsource.com](https://foundationsource.com) and click or tap For Advisors.

“One of the great things about working with Foundation Source has been that it is a partnership. Just like a client needs to be close to their attorney, advisor, and CPA, you can just add Foundation Source as one of those other advisors.”

— Barron's ranked advisor  
overseeing \$2 billion in AUM

**FOUNDATIONSOURCE**

## Pioneering Philtech: How Foundation Source Is Using Tech For Good



**Joseph Mrak**  
CEO  
Foundation Source



#### To reach the award-winning level, what obstacle did you have to overcome and what lessons did you learn?

Americans donated nearly \$500 billion in 2022 and philanthropy is one of the most prominent activities among HNW investors, yet it's largely overlooked as part of the wealth advisor tech stack. Foundation Source has worked to help advisors understand that to remain competitive and solidify long-term, trusted relationships with clients, they must address philanthropy as part of an overall financial plan.

It's priority number one for us to lay that groundwork before introducing our "PhilTech", which is one of the only offerings focused exclusively on charitable giving matching the sophistication of the tools available to support investment and risk management. Once advisors understand why they should dedicate more time discussing philanthropy with clients, our tech solutions tend to resonate more.

#### How do you intend to sustain your standards and take things to a higher level?

Foundation Source's purpose-built technology and deep experience have created economies of scale that lower the cost of foundation ownership and enable donors, nonprofits, and their advisors to operate more efficiently and maximize impact. We are constantly looking for opportunities to enhance the experience, functionality, and capabilities of our technological platforms.

As we expand into new areas of the charitable giving landscape, we aim to broaden and enhance our enterprise-caliber solutions and make seamless the incorporation of charitable solutions onto advisors' desktops. Taking our success to the next level means becoming the go-to resource for the over 70,000 wealth advisors out there.

#### In what ways will receiving this award make a difference to you, your team, and clients?

This recognition is hugely motivating for us and affirms the value of our technology to advisors and donors. One of our goals is to support advisors in helping their clients pursue philanthropic missions, and we hope to continue making advisors aware of the resources and tools available to them to provide clients with strong, well-rounded services.

Today we support more than 4,000 charitable organisations, administer more than \$22 billion in foundation assets, and facilitate more than 120,000 grants and planned gifts annually. Our growth speaks to the efficacy of our solutions and drives us to continue evolving and innovating for our clients.

#### Who and what inspires you?

We are wholly inspired by our clients and the work they do to generate positive social impact. In 2023 alone, our clients granted \$1.5 billion and made over 50,000 individual grants. The generosity, passion, and commitment they demonstrate for the communities and causes they support is changing the world, and we are devoted to providing best-in-class solutions that empower them to focus on what matters most: their missions.