

# Helping More Philanthropists Create Greater Impact



**Joseph Mrak III - CEO**  
**Foundation Source**

**F**oundation Source is the leading provider of philanthropic software and services, helping wealth advisors engage with donors and nonprofits effectively. We offer scalable, end-to-end solutions across a broad range of charitable giving vehicles, including private foundations, donor-advised funds, planned giving programs, fiscal sponsorship and endowment sub-accounting.

As of December 31, 2025, Foundation Source supports more than 5,600 private foundations, 20,000 DAF account holders, and 1,700 nonprofits. We administer over \$55 billion in charitable assets and facilitate more than 190,000 grants and planned gifts annually, representing over \$4 billion in charitable aid. Our integrated platform helps advisors expand their philanthropic capabilities while improving client service, operational efficiency, and compliance.

## **In what ways have your colleagues contributed to making an impact, both internally and externally?**

Everything we deliver rests on the expertise of our team. Over the past few years, we have deepened our offering and expertise, bringing together specialists in private foundations, donor-advised funds, planned giving, and strategic philanthropy, drawing on more than a century of combined experience. That collaboration allows us to anticipate trends and translate complex topics into practical guidance.

Externally, it shows up in the advisors we equip, the donors we guide, and the thousands of nonprofits that receive funding through our platform each year. We are enabling charitable capital to be translated into measurable, lasting impact on the causes our clients care about most.

## **What difference do you hope winning this award will make for your business, colleagues, and clients?**

This recognition affirms that philanthropy belongs at the center of wealth management as a core component of holistic financial guidance. As the keepers of clients' finances, advisors are uniquely positioned to facilitate charitable giving, but they need the right tools and support to be effective. We're giving advisors confidence to navigate personal, values-based conversations, and translate clients' charitable goals into measurable action.

I hope this award is motivational for the hard work our teams do each day to help clients fulfill their philanthropic goals. As our company grows, it's important to stay grounded in our mission – distribute more gifts more effectively and create lasting change in the world.

## **Looking ahead, how will you maintain your leadership and impact in the philanthropic sector?**

A historic wealth transfer is underway, and the next generation expects their wealth to reflect their values. We are meeting that moment by equipping advisors with the technology and resources needed to integrate giving into every client relationship, without adding complexity to their practice.

We will continue to lead the way we always have, by combining technology, expertise, and operational excellence to scale philanthropic advice across the industry, bringing the same rigor to charitable planning that the field has long applied to investment management.

We look forward to incorporating new innovations and partnering with the people and companies that help charitable capital reach the causes that need it most.