

PHILANTHROPIC SERVICES

PERSONALIZED SERVICES FOR CHARITABLE GIVING

Create Your Philanthropic Legacy

A personal wealth transfer plan is not complete without considering philanthropic goals and charitable giving strategies.

Deciding how you can use your wealth to help others can be a deeply personal choice for you and your family. One of the keys to achieving your philanthropic goals is to establish a lasting relationship with a strong financial institution that provides you with thoughtful and consultative charitable services. That's where we can help.

A CONSULTATIVE APPROACH

At Northern Trust we are committed to helping you integrate your philanthropic goals into a comprehensive wealth transfer plan. You will have an experienced philanthropic services specialist to help you evaluate alternative charitable solutions and articulate a philanthropic plan for you and your family. Whether you wish to be involved a lot – or a little – in the day-to-day activities of your chosen charitable vehicle, we will work with you, your family and your advisors to implement your strategy.

HELPING YOU FULFILL YOUR COMMITMENTS

For families interested in establishing a legacy of giving, Northern Trust offers a wide array of philanthropic solutions:

- Donor advised funds
- Endowments
- Charitable remainder trusts
- Charitable lead trusts
- Private foundations
- Public foundations
- Supporting organizations

Services tailored to your unique experiences and philanthropic expertise.



If you have not yet established a charitable giving plan or are new to philanthropy, we can help you identify and refine your philanthropic goals. We will help implement an effective, long-term charitable giving strategy to achieve your objectives.

If you are currently engaged in philanthropic giving, we can offer an expert assessment and analysis of existing giving strategies. Based on our intimate knowledge of current trends and best practices, we can also offer assistance in refining gifting techniques and grant making strategies to help ensure that your philanthropic resources have a significant impact.

If your philanthropic experience and giving initiatives are well established, we can research new philanthropic strategies and resources to develop new and innovative programs. In addition, we can provide advice and best practices for board development, governance and succession planning.

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Northern Trust's philanthropic advisory services are supported by our dedicated administrative and investment management professionals.

ADVISORY SERVICES

We support your efforts – individually and in your role as director or trustee of a private foundation – by offering the following consultative services:

- Defining and clarifying goals
- Developing and evaluating mission statement
- Exploring various giving options
- Consulting with tax and estate planning professionals to implement and maximize giving
- Defining grant making guidelines and establishing due diligence procedures
- Developing procedures for grant distributions, post-grant evaluations and recordkeeping
- Assisting with board governance policies, procedures and succession planning

ADMINISTRATIVE AND OPERATIONAL SUPPORT

Skillful, proactive administration, backed by comprehensive operational support, is the backbone of successful philanthropic programs.

To help you meet your personal and philanthropic goals, we provide the following support:

- Document review, as appropriate
- Periodic review and evaluation of gift planning
- Maintenance of donor information
- State and federal reporting
- Grant proposal/request collection and dissemination
- Grant payments
- Tax planning, reporting and compliance
- Safekeeping of securities
- Security transaction and asset recordkeeping

INVESTMENT MANAGEMENT

Appropriate investment strategies and effective management of assets are key to the continuity of your philanthropic goals. Northern Trust helps clients satisfy the unique requirements of their charitable trusts or foundations through a disciplined investment approach based on:

- Establishing investment objectives, including cash flow requirements;
- Providing investment research to support asset allocation decisions; and
- Constructing a portfolio based on your objectives, choosing from the following possible solutions.
 - Equities
 - Fixed income
 - Short-term asset management
 - Indexed and structured products
 - Alternative investments
 - Mutual funds, including multi-manager products

EXPERIENCE YOU CAN TRUST

For more than a century, generations of individuals, families and their foundations have turned to Northern Trust for guidance in establishing and maintaining their charitable giving legacies.

You can feel confident in the expertise of our dedicated philanthropic services team led by Marguerite H. Griffin. As national director, Marguerite consults with clients, their families and their advisors on a variety of charitable giving strategies and grant making practices. Her experience – including estate and charitable gift planning, private foundation administration and nonprofit

organization and management – has helped establish Marguerite as an industry-recognized expert.

FOR MORE INFORMATION

We invite you to contact your relationship manager to learn more about how Northern Trust's philanthropic services specialists can help you evaluate alternative philanthropic solutions and allow you to focus on what matters most. We also encourage you to consult with your legal or tax advisor to ensure your charitable intentions are integrated into your wealth transfer plan.

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