



A STRATEGIC APPROACH TO PHILANTHROPIC GIVING

At Stonehage Fleming, we see philanthropy through the prism of the family and family succession planning.

OUR APPROACH

We believe in a more strategic approach to philanthropy, one that meets your short or medium-term philanthropic objectives but also formally integrates philanthropy with succession planning and takes account of long-held family values.

This means ensuring the next generation is actively involved with the family's philanthropy decision-making, working together with other family members to embrace their values fully and moving forward harmoniously in pursuit of worthwhile causes.

MANAGING YOUR PHILANTHROPIC INVESTMENTS

Managing the investments of philanthropic foundations is recognised as a specialist activity. It requires significant understanding of the particular issues connected with charities and charitable foundations. We have considerable experience in this area, dating back more than forty years.

We have designed investment strategies, portfolios and reporting structures to meet the specific needs of charitable foundations; including

spending policies which ensure that the real value of an endowment is preserved in the long-term.

Where we have a broader involvement with the charity, and often with other aspects of family finance, a philanthropic policy can inform and inspire our investment choices and day-to-day financial decisions.

ESTABLISHING STRUCTURES AND GOVERNANCE

Stonehage Fleming will recommend, implement and operate appropriate structures, with suitable objectives, grant-making policies, governance and decision-making processes. All of these are designed to align with wider family finances and governance.

With our international experience we have expertise in helping families to create philanthropic structures in jurisdictions around the world. In addition to this, we can help charities deal with any tax or legal considerations in making donations outside of their country of jurisdiction.

MANAGEMENT AND ADMINISTRATION SERVICES

Where required, we provide management and administration services to implement the family's philanthropic objectives. We can receive and assess applications and deal with grants in accordance with the decisions of trustees or family members.

Where grants are made on a multi-year basis, we can report back on progress in the interim and the appropriateness of completing the grant programme.

MAKING THE COMPLEX SIMPLE

However you wish to work with us, you will always have a principal point of contact. This makes your relationship with us simple and straightforward, and ensures that the management of individual aspects of your family's finances is always considered in the context of your broader arrangements.

To find out more, simply contact your Stonehage Fleming adviser
email: enquiries@stonehagefleming.com or visit: stonehagefleming.com

