



## Create a Strategic Philanthropic Plan with Return on Good

Whether you are looking to create a Foundation, begin a Donor-Advised Fund or want to develop a more intentional strategy for giving, Return on Good, a strategic philanthropy cooperative, has the resources to help you give smarter, with outstanding impact.

The experienced Return on Good advisors guide you through an intentional planning process that includes eight interactive and lively sessions grouped together or individually, (in person or via Zoom), designed for your family office team and family members or private individuals:

- 1. GIVING IMPACT RECORD** complete our Giving Impact Record to quantify your lifetime giving
- 2. DONOR IDENTITY/PASSIONS** identify your giving style, your key missions and where you want to have the most impact
- 3. PHILANTHROPIC MISSION STATEMENT** create a Philanthropic Mission Statement to use for advising charities on how to approach you and guide your family on a giving strategy.
- 4. STRATEGIC GIVING PLAN** Develop a Strategic Giving Plan to direct your giving today and for the long term.
- 5. RESEARCH REPORTS** ROG provides in-depth research reports to validate the non-profits in your proposed plan.
- 6. GIVING STRUCTURE** consultation to set up new giving vehicles or evaluate your current foundation, DAF(s) and endowments.
- 7. FACILITATION OF GIFTS** Direct work lead by ROG advisors with identified charities to facilitate high impact giving investments, through our Gift Facilitation process.
- 8. LEGACY VIDEO** tell your giving story with a memorable legacy video to help inspire others, and share with future generations.

## ROG Strategic Giving

ROG Strategic Giving is great for:

- New Family Offices who are starting the process for an intentional legacy of philanthropy.
- Families who are ready to make short term and long term plans aligned with their wishes and desires.
- Individuals with significant wealth who want to make a strategic impact.
- Key stakeholders who want a collaborative giving planning process that is both intentional and enjoyable.

This list represents commonly included activities. The Strategic Philanthropy Planning process is fully customized based on where you need the most assistance and guidance, with full transparency to the work plan and what you receive with your partnership.



## Ready to Do the Most Good?

There are more than one million+ non-profits in the US with so many worthy causes and investments available today, distinguishing your worldly contribution to make a unique case for support is a challenge.

We're here to help you every step of the way – from articulating your vision to the actual deliverables and digital footprint that get you off the ground to engaging friends, family and supporters about the “why” of your mission.

Partner with ROG to add a spark that ignites your mission quickly with the greatest impact.

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