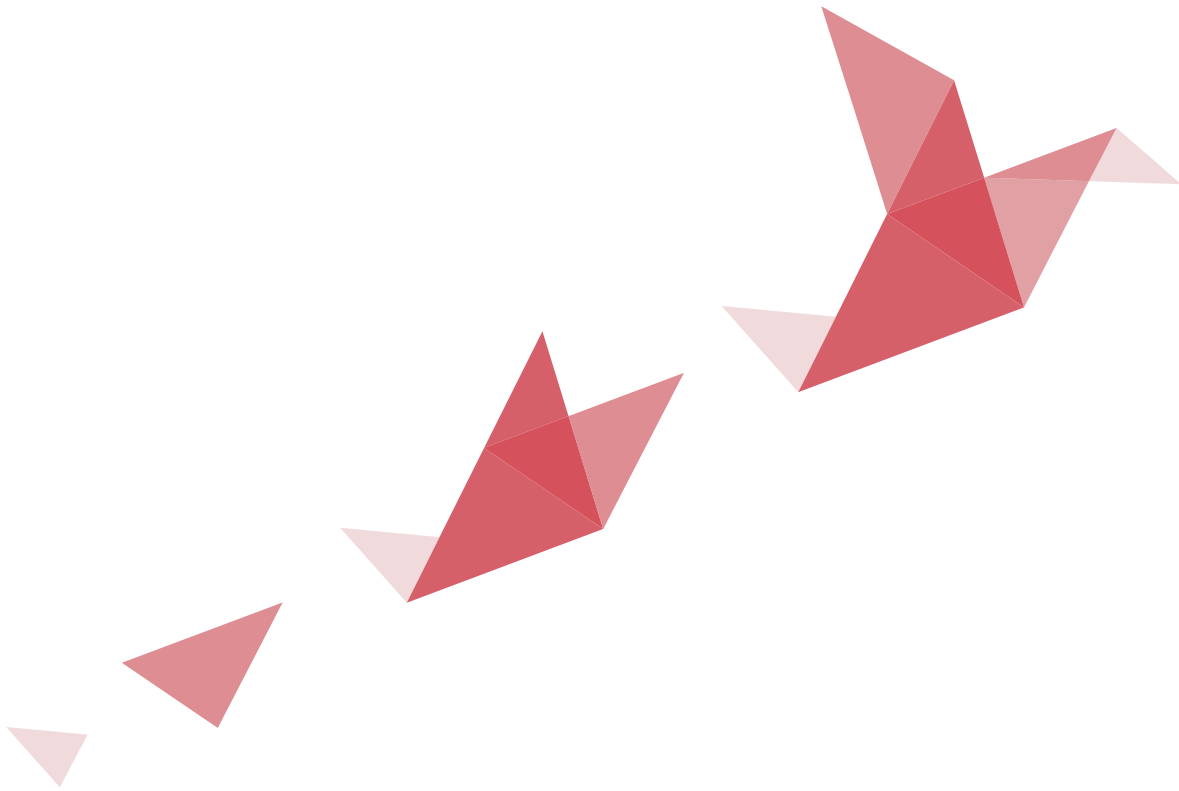




# SWISS PHILANTHROPY

Foundation

Creating and Managing Philanthropic Funds



## **Is philanthropy for you?**

Isn't it time you made a difference with your wealth, in your name or in memory of a loved one? Whether your goal is to become an active philanthropist or to donate anonymously, our mission is to

**Make philanthropy easier**

## Are you an individual, an entrepreneur or a family?

We offer three easy ways to take your giving to the next level

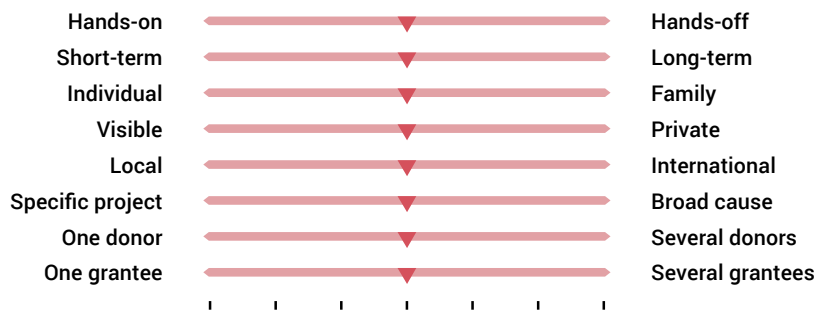
Set up a personal philanthropic fund	Join a thematic philanthropic fund	Donate elsewhere in Europe
<p><b>Description</b></p> <p>A personal philanthropic fund is an independent entity hosted by the Foundation. It can be named after you, your family or a loved one.</p> <p>The fund is guided by a steering committee that includes the donor or his/her representative – such as a family member, a member of the Foundation Board and/or outside experts recommended by Swiss Philanthropy Foundation.</p> <p><b>Advantages</b></p> <p>Our Foundation handles the everyday management and legal aspects of your fund, enabling you to focus on a cause that is close to your heart.</p> <p>Costs are shared among hosted funds, keeping fees low.</p> <p>You may also choose to join other philanthropists in setting up a collaborative fund, managed in the same way as a personal philanthropic fund.</p> <p><b>Contribution</b></p> <ul style="list-style-type: none"> <li>• Personal philanthropic or collaborative fund with initial capital : minimum of CHF 300,000 ;</li> <li>• Personal philanthropic or collaborative fund without initial capital : minimum CHF 100,000 per year for at least three years.</li> </ul>	<p><b>Description</b></p> <p>Join other donors in giving to one of four thematic philanthropic funds managed by Swiss Philanthropy Foundation, focusing on :</p> <ul style="list-style-type: none"> <li>• Education and employment</li> <li>• Health</li> <li>• Social impact</li> <li>• Promoting philanthropy</li> </ul> <p><b>Advantages</b></p> <p>The Foundation Board ensures that your donations reach rigorously selected projects, at no expense to you.</p> <p>We keep you regularly informed about the impact achieved through the grants made by the thematic fund.</p> <p>If you donate CHF 100,000 or more to a fund, we help facilitate visits to the projects supported by your giving.</p> <p><b>Contribution</b></p> <p>Minimum donation of CHF 10,000.</p>	<p><b>Description</b></p> <p>Swiss Philanthropy Foundation is the only organisation in Switzerland affiliated with Transnational Giving Europe (TGE), a network of foundations that helps more than 3,000 donors make tax-deductible, cross-border grants to carefully screened organisations in some twenty countries in Europe.</p> <p><b>Advantages</b></p> <p>Increasingly, our lives and interests transcend national borders. But those aspirations are not yet always reflected in most countries' tax laws. TGE makes it simple and safe to donate to non-profit organisations across Europe, while allowing you to claim a tax deduction in your country of residence.</p> <p><b>Contribution</b></p> <ul style="list-style-type: none"> <li>• Minimum donation of CHF 500 ;</li> <li>• For donations above CHF 50,000, special conditions apply.</li> </ul>

## What kind of philanthropist are you?

Every donor is different.

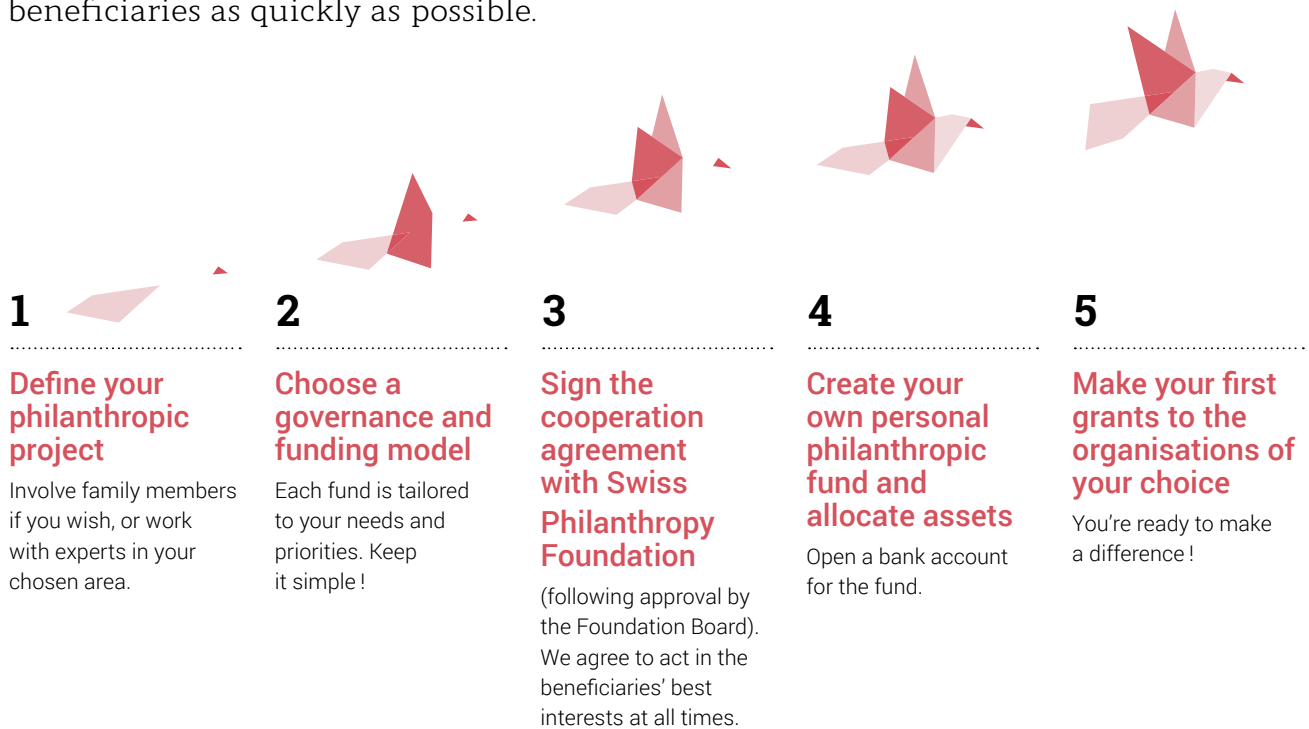
So that we can get to know you and help you make the right choices, here are a few of the questions we may ask when we meet with you:

What kind of philanthropist do you want to be?



## 5 key steps to create your philanthropic fund

Our solutions help ensure that your giving reaches potential beneficiaries as quickly as possible.



The best part comes next, as we monitor the impact of your giving together.

## Why choose Swiss Philanthropy Foundation?

Swiss Philanthropy Foundation was formed in 2006 as a Swiss non-profit hosting foundation, enjoying tax-exempt status.

Our mission is to encourage philanthropy by creating, hosting and managing philanthropic funds.

Our commitment to making philanthropy easy rests on three core values:

- ▶ **Independence**
- ▶ **Professionalism**
- ▶ **Simplicity**

### 4 advantages of our solutions



#### **Flexibility**

The Foundation's charitable goals, which are broadly defined, enable you to support a variety of projects with a high degree of flexibility in how you organise and run your fund.



#### **Impact**

You are free to focus your time and resources on your philanthropic goals. Expert professional advice is available whenever you need it.



#### **Low cost**

Personal philanthropic funds are much simpler to set up and less time-intensive to run than foundations. Management fees are kept low, at 3-5% of annual contributions, by sharing running costs among hosted funds.



#### **Reputation**

The Foundation Board provides the expertise and high standards required of a reputable philanthropic institution today. As a partner of the Transnational Giving Europe network, we are the sole counterpart in Switzerland for prominent institutions such as the Fondation de France, Fondation Roi Baudoin (Belgium) and Charities Aid Foundation (UK).

### From 2006 to 2016

#### **36 hosted philanthropic funds:**

- > CHF 163 million in hosted assets
- > CHF 8.5 million in average annual grants
- > 100+ projects in Switzerland and abroad, in a range of areas (health, education, research, arts, the environment, social development)

Swiss Philanthropy Foundation's good governance charter has been approved by the Center for Philanthropy Studies (CEPS) at the University of Basel, a recognised authority in the field. Our accounts are audited by PWC in Geneva.

## 11 frequently asked questions

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01

### What is best for me: a foundation or a philanthropic fund?

- In the last decade, philanthropic funds have become a fast-growing alternative to foundations for donors who want to give their time and resources to a cause they care deeply about, without creating a stand-alone structure. Funds are an easy and personalised way to launch your philanthropy before taking it to the next level ;
- Foundations are the best-known and most common solution. If you wish to hire dedicated staff and maintain close control over your giving, a foundation may be the solution for you.

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02

### Should I donate directly to an organisation, or set up a philanthropic fund ?

Most donors in Switzerland give directly to non-profits. However, if you regularly make large donations, or you have a specific goal you want to achieve, a fund can help you organise and professionalise your giving, thereby increasing its impact.

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03

### How do I choose a cause and get started?

Defining "your" cause and how you might realise your vision is an essential first step. Working together, we help you outline your goals, and put you in touch with philanthropy advisers who can assist you in further developing your charitable project.

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04

### How much does it cost to set up and run a fund ?

- Set-up costs: CHF 5,000 ;
- Annual fees : 3-5% of grants disbursed (min. CHF 3,000/year). The exact percentage depends on the complexity of the fund and the services you request.

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### Can I manage my fund as I want ?

Your fund reflects your priorities and aspirations. As a donor, you can :

- Recommend organisations you want to support, provided their goals align with those of Swiss Philanthropy Foundation;
- Appoint members of the steering committee that oversees all or part of the grant allocation process ;
- Choose a reputable service provider to manage your fund's assets.

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06

### Can I make changes to my fund or close it down ?

- You can add members to your fund's steering committee or alter the size of your grants ;
- The fund can be closed if the required financial resources are no longer available, or if you decide to transfer its assets to a foundation of your choice (including your own foundation), provided its goals are similar to those of the fund.

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07

### What is my legal responsibility ?

- Personal philanthropic funds have no independent legal status; Swiss Philanthropy Foundation is legally liable for the activities of all hosted funds. The Foundation Board therefore ensures that the recommendations of each fund's steering committee align with its own goals and comply with Swiss law ;
- The donor's role and responsibilities are defined in a "collaboration agreement," jointly signed by the donor and Swiss Philanthropy Foundation.

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08

### How much of my time will be spent on the fund ?

- Personal philanthropic funds adapt to your needs, so you can be as involved as you want in managing your giving. This solution is ideal for donors who want to focus on a specific project over a defined period, or who want to start giving without the time commitment and investment of creating a foundation ;
- Thematic funds take up very little of your time. You choose the amount of your one-time or periodic contribution to the fund supporting the cause you care most about, and we report to you regularly on the organisations receiving grants and the impact achieved by your giving ;
- Collaborative funds are the most time-intensive of the three, as founders need to coordinate with each other. Your time commitment may vary depending on the nature and complexity of the fund's objectives.

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09

### Is there an ideal time of life to start a fund?

- Whether you are young and active, nearing the end of your career or retired, or have recently inherited wealth, you can begin your philanthropy at any time of life ;
- Swiss Philanthropy Foundation supports philanthropic projects at various levels of maturity. You don't need to have a detailed action plan before setting up a fund.

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### Can I include family or friends in the fund's activities ?

Each fund has a steering committee whose members can include relatives, friends, partners and outside experts.

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### How visible will my fund be ?

Some funds hosted by Swiss Philanthropy Foundation prefer staying out of the public eye, while others seek visibility. The decision is yours. You may name the fund after yourself, or opt for a more generic name. The fund's positioning is addressed in the cooperation agreement with Swiss Philanthropy Foundation.

Nonetheless, the Foundation Board is committed to providing full transparency on all hosted funds to the Swiss charities regulatory authority.



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