

**Our Values**  
Integrity  
Simplicity  
Innovation  
Independence  
Diversity

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# Turning your philanthropic goals into a reality By your side at every step of your giving journey

**Donor-advised** funds are an attractive alternative to a private foundation. An increasingly popular solution, they deliver the **simplicity, efficiency, and flexibility** that donors are seeking and allow them to focus exclusively on supporting the causes they care about, with none of the hassle of setting up and running a foundation. Creating your donor-advised fund could be the first step to realizing your philanthropic ambitions.



## 1. Define your philanthropic goals

Your fund should reflect to your vision of philanthropy. First, you need to define what you want to achieve, and how you will go about it. Do you want to be actively involved in selecting beneficiary organizations? Do you plan to give in the short, medium, or long term? Do you hope to make a difference locally or internationally? Will your philanthropy be discreet or public? Have you already identified specific projects or causes you wish to support?

We look forward to exploring the options with you, to help you make the best choices.



## 3. Sign a collaboration agreement with Swiss Philanthropy Foundation

Once your philanthropic project has been approved by the Foundation Board, we sign a collaboration agreement that defines our respective roles and responsibilities and outlines how we will work together to turn your philanthropic vision into a reality.

Donor-advised funds are not independent legal entities. Swiss Philanthropy Foundation is legally responsible for all the funds it hosts.

A one-time opening fee is charged at time of creation, as well as an annual fee for administrative costs. The exact fee structure may vary according to your specific situation and will be determined at the outset.



## 2. Choose a governance and funding model

You are free to choose a name for your fund and to invite family members, friends, or others to join its steering committee. A member of the Foundation team will also sit on the steering committee to provide guidance as needed. At a later stage, you can opt to change the makeup of the committee, the size of your contribution, or the amount of grants to beneficiaries.

Your donor-advised fund can be funded through an initial capital donation or an annual contribution.



## 4. Set up your donor-advised fund and invest its assets

The next step is to open an account for your fund with your bank of choice. If you opt for an initial capital donation, you can instruct us on how you wish the assets to be invested and by which financial institution.



## 5. Make your first grant

You choose the organizations and projects to which you wish to allocate grants and define the duration of your support. We take care of everything else!

# Your philanthropy, our expertise

Swiss Philanthropy Foundation: Helping you bring philanthropic initiatives to life and build a better world.



**SWISS PHILANTHROPY**  
Foundation  
Creating and Managing Philanthropic Funds

# Swiss Philanthropy Foundation

## Committed to the success of your philanthropy



**CHF 380+ million**

Hosted since the creation of Swiss Philanthropy Foundation, of which two-thirds have been distributed as grants to date



**90+**

Donor-advised funds set up since the creation of Swiss Philanthropy Foundation



**CHF 30+ million**

Total grants distributed on average annually



**500+**

Organizations supported each year by our donor-advised funds



**10+**

Languages spoken by our diverse team

## Our partner ecosystem

As part of a strong ecosystem of Swiss and international partners, Swiss Philanthropy Foundation continuously monitors **social and regulatory developments**. We actively cultivate new partnerships and leverage synergies through membership in leading Swiss and international networks, including **SwissFoundations, proFonds, Swiss Sustainable Finance, Sustainable Finance Geneva, Transnational Giving Europe, and Philea**.

**Whatever your goals, your age, or your stage of life, Swiss Philanthropy Foundation can help you realize your philanthropic vision**



### Personal funds

Do you want to focus your philanthropic giving on causes or projects close to your heart? Do you want to make a difference for society and ensure your giving has a lasting impact? Are you hoping to unite your family around a common purpose and values? Our **personal funds** adapt to your specific vision and offer bespoke solutions to realize your philanthropic goals.



### Testamentary funds

**Testamentary funds** enable you to ensure your philanthropy has an impact after you are gone by planning your legacy during your lifetime. You choose the beneficiaries you wish to support, based on your values and convictions. Our integrity and independence guarantee that your donation will be distributed according to your stated wishes.



### Donor collaboratives

If you want to go fast, go alone; if you want to go far, go together, the saying goes. Sometimes, collaboration is the best strategy. **Donor collaboratives** allow multiple donors to leverage their resources towards a shared goal. They offer a highly effective way to maximize your impact, especially when seeking to achieve systemic change. We have extensive experience in helping donor circles and foundations structure and manage their collaborative philanthropy.



### Transnational giving

Thanks to **Transnational Giving Europe**, your giving reaches beyond borders. This international network facilitates donations in 20+ countries across Europe, while allowing you to claim a tax-deduction in your country of residence. Our **General Donations Fund** offers a solution to facilitate giving in other areas of the world, with the confidence that your donation will be transferred securely and used as intended.



### Thematic funds

If you are taking the first step on your philanthropic journey and are not sure where to start, our **thematic funds** could be the right choice for you. They enable donors to support high-impact projects that have been carefully vetted, planned and monitored by experts. You co-fund these projects with other donors from our network, meet like-minded philanthropists who support the same causes, and learn how to plan and manage a philanthropic project from start to finish.

## The leading hosting foundation in Switzerland

Founded in 2006, Swiss Philanthropy Foundation is an independent, **public-utility** hosting foundation based in Geneva, a hub for many international organizations and non-profits. Donations to the Foundation are fully tax-deductible for Swiss residents.

## Dedicated to philanthropy

Our mission is to facilitate and support high-impact philanthropy. We have developed solid expertise in governance, due diligence on beneficiary organizations, and monitoring of grants distributed by the Foundation. With over **20 years of experience**, our reputation is unrivalled.

## Guided by your philanthropic intentions

Working with Swiss Philanthropy Foundation empowers you to choose the specific causes, regions, themes, or social groups you wish to support. You can also develop your own philanthropic project, provided it meets the Foundation's public-utility criteria. We carry out the required due diligence and handle all practicalities, from administration to accounting to monitoring the use of your donations. That leaves you free to **focus exclusively on your philanthropy**.

## We make giving easy

Making grants that meet your philanthropic aims, ensuring they are properly managed by beneficiaries and used for the intended purpose, is a complex task. We have the expertise necessary to make this process **simple, accessible, and cost-effective for you, by pooling resources**.

## A rigorously independent approach

Our **independence** from any corporation or public or private institution leaves you free to choose the service providers you wish to work with. We have developed an **ecosystem of trusted partners** that can provide you with personalized, high-quality solutions. Our team and Board take all possible steps to ensure your fund is managed to the highest standard of professionalism and integrity, as defined in our Good Governance Charter.

## Powered by innovation

Our **committed and dynamic** team takes an innovative, entrepreneurial approach. We constantly seek to improve our services and processes, to provide donors with agile and flexible solutions, as well as the best possible experience. We listen to your needs and do all in our power to help you realize your philanthropic ambitions.

## Your assets are managed sustainably

Our **Financial Management Charter** ensures the Foundation's assets are managed according to the highest standards of governance. Additionally, we are deeply committed to **sustainability**. For the past several years, more than 80% of hosted fund assets have been invested according to ESG criteria (environment, social, governance).

