



The Family Philanthropy Inventory Checklist

Where are you in your philanthropic planning?

Where would you like to go? How can we help you get there?

The JCF Family Philanthropy Institute offers many tools for philanthropic families. Select the ways we can help you:

- Private consultations to help you clarify**
 - your family mission
 - the impact of your legacy
 - how you want to be remembered

- Individual work sessions on intergenerational family foundation issues and solutions including:**
 - Family dynamics
 - Geographical challenges
 - Strategic philanthropy vehicles
 - Funding opportunities
 - Establishing grant guidelines
 - The funding process
 - The role of trustees
 - Access to resource materials, publications

- Fund Management/administration**

- Investment, tax & financial management**
 - Assistance in developing investment policies
 - Monitoring and reporting on investment performance
 - Planned giving advice

- Monitoring and evaluating funded projects**

- Liaising with your financial advisors**

Visit the FPI web page for more info

Contact us for a free copy of the JCF Workbook for Families

Set up a confidential consultation with
Bobby Kleinman FCA, Executive Director and/or Barry Pascal, President