



Your Philanthropy, Your Purpose

At the root of giving—whether it’s through the gift of funds, time, or voice—is a wish to make a real difference and impact the world around you. Whether you have an established plan or are starting your philanthropic journey, Bernstein Private Wealth Management can guide you through your choices and help you build a charitable-giving strategy that will best fulfill your mission.

Donors Face Challenging Questions

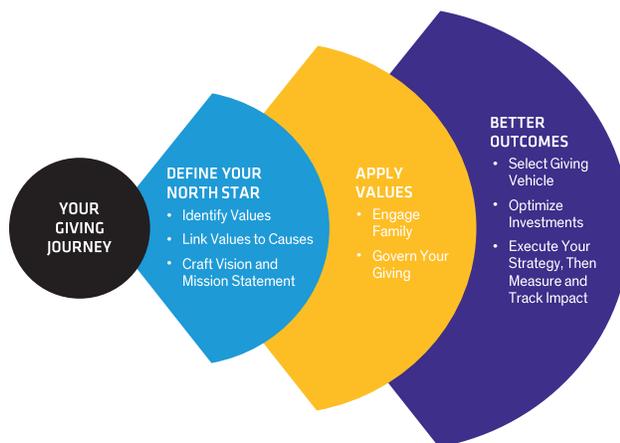
- My income is higher than normal this year and I want to create a philanthropic plan...where do I start?
- Our parents are stepping down from the family foundation and my siblings and I now have control. How do we successfully transition and become stewards of our parents’ philanthropic legacy?
- How do I uncover which charitable-giving strategy best reflects my values and achieves impact?
- How do I determine which assets on my balance sheet are optimal for giving?
- Which asset allocation will best support my mission while also enhancing my gifts to charity?

Define and Grow Your Philanthropic Impact

Whether you’re a C-suite executive, in the early stages of selling your business, or perhaps enjoying retirement, you may long to leave the world better than you found it. But the path to achieving impact is often multifaceted. At Bernstein, we guide you through the complexities and customize a strategy to maximize your giving.

Philanthropy involves personal choices. That includes establishing values and goals, then determining how to reach them. Understanding them at an intimate level forms the basis for your philanthropic vision and mission. From there, we can map out the elements of your charitable plan and weigh the trade-offs together. Finally, execution entails identifying which assets are most efficient to donate, choosing the ideal giving vehicle, and determining which investments make sense. Once your plan is established, we help to monitor and track your philanthropic “success.”

A CUSTOMIZED ROADMAP TO ACHIEVE BETTER OUTCOMES



We can join you for the whole journey or meet you at any point on your path to better philanthropic outcomes.

What Sets Us Apart

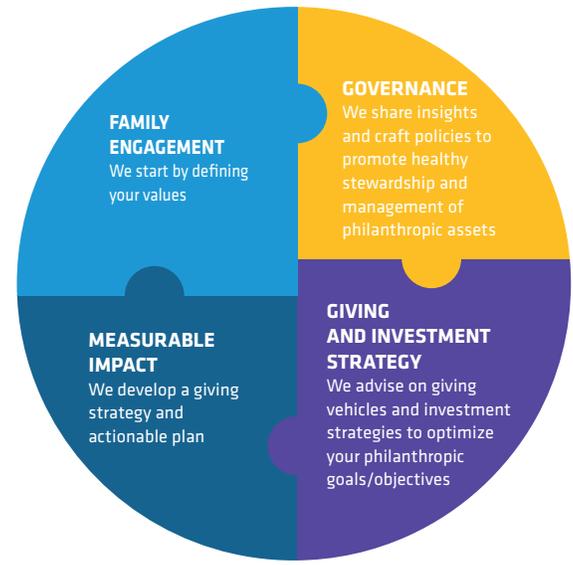
Bernstein aims to help clients, causes, and communities envision—and achieve—a more prosperous, meaningful future. That includes addressing complex challenges that extend well beyond wealth management—like achieving impact.

Our dedicated Philanthropy Institute services clients nationally, sharing insights heard from families, foundations, and charities across the globe. They then combine that knowledge with technical and social-emotional expertise for our clients.

Individuals and families turn to us to help them set philanthropic priorities and construct a charitable-giving strategy aligned with their overall wealth plans. We also provide resources to help you uncover your motivation for giving, and the causes and communities you wish to support. State-of-the-art tools allow us to quantify your giving capacity without undermining your long-term spending or wealth transfer needs. Importantly, we help you measure your total philanthropic impact over time.

We aim to provide advice that makes a difference, prioritizing solutions that are intentional, meaningful, and holistic.

OUR FLEXIBLE APPROACH TO VALUES-DRIVEN PHILANTHROPY



Size of puzzle pieces vary, depending on your values and needs.

Put the Power of Bernstein to Work for You

Bernstein seamlessly navigates the complex decisions that individuals and families face and steers them toward fulfilling their philanthropic goals:

Governance

- Crafting formal grant, spending, and investment policies
- Preparing the next generation of leaders
- Establishing mission and vision statements

Family Engagement

- Guiding unique exercises to identify priority areas of impact
- Facilitating family meetings to communicate shared values and legacy
- Incorporating heirs in giving plans

Giving and Investment Strategies

- Identifying the most efficient assets to give
- Aligning time horizons
- Deciding between immediate, staged, or deferred gifts
- Designing asset allocation strategies and undertaking risk analysis
- Exploring purpose-driven investments

Measurable Impact

- Creating annual philanthropic budgets tied to mission and giving goals
- Tracking and consolidating family giving over time
- Assessing the impact of giving strategy across family, organizations, and vehicles



Growing Your Giving

Bernstein's Growing Your Giving cards are an engaging way to help you identify your philanthropic priorities. By reflecting on your priorities in a simple and accessible way, you gain insight into what motivates you to give and the causes that are most important to you. For some, that may be a short list and for others, it may be lengthy. For those in the early stages of planning a philanthropic strategy, this can help determine your areas of focus. Those with more established philanthropic plans will find them helpful for engaging family, assessing impact, and determining whether enhancements to the plan are prudent. Either way, the team at the Bernstein Philanthropy Institute works closely with you to facilitate discussions and create a philanthropic budget that is monitored and tracked for impact and revised as needed over time.

Bernstein does not provide tax, legal, or accounting advice. This document is for informational purposes only and does not constitute investment advice. There is no guarantee that any projection, forecast, or opinion in this material will be realized. The views expressed herein may change at any time after the date of this publication.

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