



2022

EXCELLENCE IN GIVING  
**PROSPECTUS**



*Excellence in Giving*  
the joy of generosity



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//  
**CLIENT  
QUOTES**  
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**“Al Mueller’s personal advice, involvement, and partnering with my family is invaluable and greatly responsible for any accomplishment we enjoy with the Fort Worth/Empart partnership. God certainly has His hand on you and what you bring to His Great Commission.”**

-Tom C., Fort Worth, TX

**“We would not have reached the charities we are now supporting without [their] experience. [Excellence in Giving] is helping us make sure the money is being used in the ways we intended.”**

-Paul K., Stamford, CT

**“We even feel better about what we are doing, and how we are doing it. Thanks to you and EIG, I really can say that our impact and joy have increased!”**

-Tom L., Scottsdale, AZ

**“We are grateful for your experience and wisdom in guiding us to this point in our family foundation work and the relationships which are a part of working together. We all trust you to help us help others.”**

-Molly A., San Antonio, TX

**“When we started looking at LeaderSource you looked at it and encouraged us to get involved. You were able to recognize a good thing when you saw it. This is just one instance where you have served us well. Thanks for your partnership and friendship along our journey.”**

-Dale B., Midland, TX

**“We know, love, and highly recommend Al and his team. Character and competence characterize his life and organization.”**

-Will L., Midland, TX

**“Thanks for all of the help from your team. You guys make our giving easy and well-informed.”**

-Brent J., Tyler TX

“Excellence in Giving has made our giving **low maintenance** and **high impact!**”

-Pete C., Fort Worth, TX

# BEFORE & AFTER



We **transform** your charitable giving experience.



# Excellence in Giving Process

Excellence in Giving’s advisory role begins by identifying our clients’ passions, values, and focus for philanthropy. We manage the giving portfolio by reviewing grant requests, performing appropriate levels of due diligence, conducting family meetings, establishing benchmarks for each gift, and gathering measurable post-grant data to celebrate the impact of philanthropic investments.



# Client Profile

Our services are targeted to families and individuals who fit the following criteria:

1. Business owners or executives with significant demands on time.
2. Widows, widowers, and heirs; particularly those whose spouse or parent made most financial decisions.
3. Frustration responding to incoming requests for charitable gifts.
4. Desire and capacity to give \$500,000+ annually from current income and assets.
5. Actively deciding how to raise their standard of giving rather than their standard of living.
6. Families who desire to train the next generation and increase family communication about giving.
7. Values information from nonprofits about the specific, measurable outcomes from gifts.



# Client Service Options

SERVICE	DESCRIPTION	PRICE
Giving Meeting, Next Gen Family Giving, Family Meeting	Provide targeted counsel in formal, regular meetings facilitated by Excellence in Giving with organized Board Book to review giving portfolio and make giving decisions. <b>VALUE: Clear Strategy, New Ideas, Family Unity</b>	\$7,500-\$20,000 Per meeting
Source Opportunities	Presentation of new high-quality nonprofit organizations. <b>VALUE: New Ideas</b>	\$5,000-\$20,000 annually
Manage Requests	Request, collection, review, and vetting of targeted charitable giving opportunities. Respond to grant requests made directly to the Client. <b>VALUE: Proactive, low maintenance</b>	\$5,000-\$40,000 annually
Grantee Evaluation	Monitor, evaluate, and quality top nonprofit organizations selected for gifts through annual Nonprofit Analytics and Bullet-Point Evaluations. <b>VALUE: Confidence</b>	\$10,000-\$40,000 annually
Gift Optimization	Suggest ways to leverage grants, find partnership opportunities, structure grants creatively to make them go further, and help make nonprofit partners better overall. <b>VALUE: Greater Impact</b>	\$7,500-\$25,000 annually
Celebrate Your Impact	Celebrate and monitor the results of grants through written Impact Reports, site visits, vision trips, and meetings with grantee leadership. <b>VALUE: Joy</b>	\$5,000-\$20,000 annually
Grant Administration	Provide periodic Giving Dashboards and Giving Forecast reports, monitor recurring gift schedules, support grant agreements, communication with nonprofits. <b>VALUE: Low maintenance</b>	\$5,000-\$15,000 annually
Special Projects	Custom	TBD

# DISCOVERY

Explore issues you care about, the values you want to pass on, and the legacy for which you'll be remembered.

**"I am impressed with the thoroughness of your work and the insightful observations presented in a sensitive way."**

**Dale B. - TX Client**

SAMPLE DELIVERABLES





# Joy-Filled Giving Profile

Prepared for **Smith Family** by **Excellence in Giving**

## The Purpose of Our Giving

We both affirm that the purpose of the wealth entrusted to us is to serve (1) strategic international and regional organizations committed to caring for and educating orphans, and meeting the needs of the poor and widows, and (2) select local organizations that foster the welfare of the community. We will serve by providing financial resources and investing personal time.

## Our Giving Priorities

We have learned that wise stewardship involves not only funding effective organizations but also following the passions and interests we have gained through our life experiences. The following “giving priorities” will guide the use of our time, talent, and treasure.

- 1 CREATE A "LEGACY OF GENEROSITY" FOR OUR CHILDREN**  
Our children are our most important asset and most critical investment. We want to serve as models of generosity for them and involve them actively in our giving decisions.
- 2 ASSIST THE DISENFRANCHISED**  
We believe firmly in our responsibility to care for the poor and widows. We want to assist disenfranchised people by helping them discover a purpose for their lives and by encouraging them to follow sound principles.
- 3 CONTINUE TO DEVELOP A GLOBAL FOCUS**  
Through our travels, we have widened our perspective of the needs around the world. We will not only be involved in our community, but also focus globally to help social agencies changing lives in the international contexts we feel called to support.
- 4 RESCUE AND REHABILITATE ORPHANS**  
Our family experiences of dealing with the pain of childhood loneliness helps us appreciate the need for sustained physical, social and emotional care. Our giving will focus on meeting the needs of orphans around the world to foster self-sufficiency.
- 5 BECOME WISE GIVERS**  
We want to be responsible as wise stewards of our giving. Our giving will focus on organizations that demonstrate high integrity. We will give preference to projects that are innovative and have a high probability of success.
- 6 PROVIDE ENCOURAGEMENT**  
Both of us are energized by encouraging others. We will seek out specific opportunities in our giving to be an encouragement to those we give to. We want them to realize the source of our love and our generosity.

### **What Brings Us Joy in Giving**

We realize that we have unique sensitivities to experiencing joy that have been shaped through specific life circumstances. We desire to experience increased joy by:

- 1. Regular giving:** We will make a portion of our giving regular and systematic. We also want to respond to organizations that present requests for spontaneous gifts.
- 2. Active involvement:** We prefer to be actively involved in organizations we provide with significant support, giving not only our financial resources but also our time.
- 3. Witnessing results first-hand:** We enjoy seeing the organizations we support in action and hearing stories of lives that were changed. We want to visit sites and read regular reports.
- 4. Increasing in wisdom:** We want to continue to discover and understand the purpose for our resources. We want to model wise philanthropy for our children.

### **What Keeps Us From Joy in Giving**

We have taken on the responsibility to support social agencies that reach out to orphans, the poor, and to widows. In allocating philanthropic resources, however, we want to avoid:

- 1. Ineffectiveness:** We want our giving to fund innovative projects. We desire high-impact opportunities with measurable outcomes. We have been entrusted with wealth, and we take seriously our responsibility to give it away wisely.
- 2. Family wealth:** We recognize that our wealth should serve a purpose. Our children should be trained appropriately, but the responsibility to give it away lies with us.
- 3. Disorganized giving:** We desire to have a well-reasoned plan for our giving. We want to carefully examine how we give, where we give, and why we give.
- 4. Over-commitment:** We realize there are unlimited requests for our time and resources. We need to maintain a healthy balance in our lives and avoid saying "yes" to every request to serve and/or give.

# Giving Game Plan



Prepared for **Smith Family** by **Excellence in Giving**

## John and Mary Smith: Smith Family Foundation

### Purpose Statement:

The foundation exists to provide resources to meet the physical and emotional needs of disadvantaged people in Texas and worldwide.

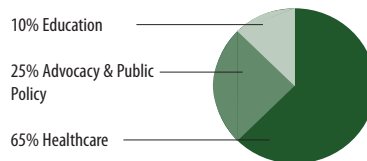
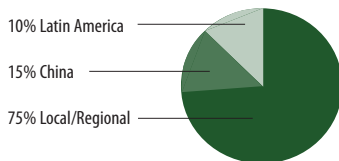
### Desired Legacy:

John and Mary Smith will be remembered as wise stewards of their resources. They maximized the impact of their generosity by carefully selecting effective organizations and by transferring their values to their children and grandchildren.

### Giving Goals and Targets:

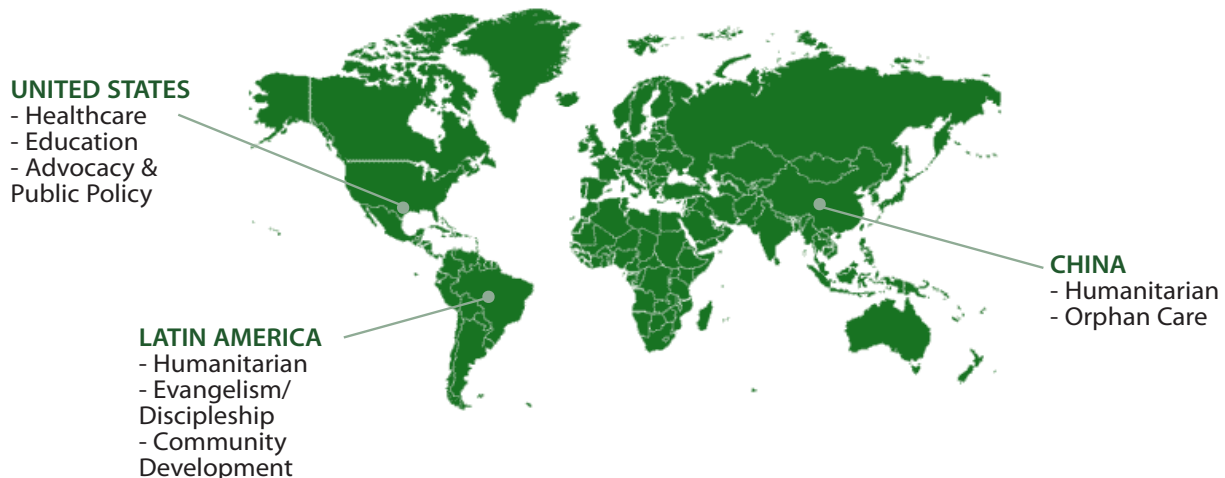
2021 Target	\$ 1,500,000
10-Year Goal	\$ 20,000,000
Legacy Goal	\$ 35,000,000

### Target Category Allocations:



### Target Geographic Allocations:

The Smith Family Foundation actively supports local charities in Texas that provide guidance and aid to the sick. In both the United States and worldwide, education is an important theme in their generosity. In addition, the foundation provides ongoing funding for organizations in China and Latin America, providing for their physical and emotional needs in a nurturing environment.



## CAPSULE DATA

### Smith Family Foundation

14319 Highview Ln.  
Dallas, TX 75225

ph 555.441.1123

fax 555.334.5512

www.smithfamilyfdn.org

Contact: Mary Smith

Year Founded: 2002

### Geographic Focus:

- Local/Regional (75%)
- China (15%)
- Latin America (10%)

Meeting Frequency: Quarterly

Annual Board Meeting: August

Disbursements: Semi-Annual

Gift Size (max): \$1,500,000

Gift Size (min): \$2,000

FY20 Assets: \$7,360,000

FY20 Total Giving: \$1,509,850

FY20 Expenses: \$77,520

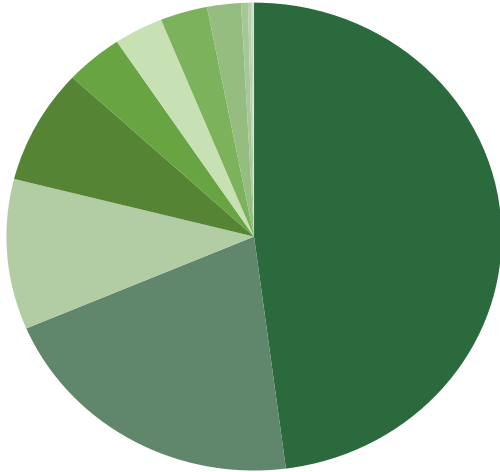
Total Orgs Supported 2020: 53

EIN: 351-87-2803



# Prepared for **Smith Family** by **Excellence in Giving**

## Total Giving by Program Area: A review of your total giving by program area, 2015 - 2020



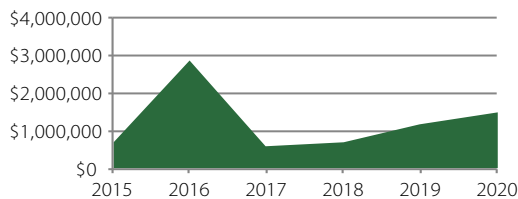
Area	Allotment	# of Orgs	Total Giving
Healthcare	48%	3	3,641,994
Advocacy/Public Policy	21%	6	1,567,775
Education	10%	8	788,481
Humanitarian/Mercy Ministry	8%	10	602,965
Environment/Animals	4%	3	285,750
Personal/Social Development	3%	10	244,200
Adoption/Foster/Orphan Care	2%	5	233,650
Evangelism/Discipleship	0%	4	168,066
Community Development	0%	2	34,000
Arts/Media	0%	3	15,100
Social Justice	0%	3	8,400
Support Services	0%	3	6,050
<b>Total</b>		60	\$7,596,431

## Top Gift Recipients: Organizations that received the highest proportion of your total giving, 2015 - 2020

	Total Gifts	Impact	Satisfaction
MD Anderson Cancer Center	\$2,432,734		H M L
Cook Children's Medical Center	\$1,000,000		H M L
Texas Christian University	\$ 731,111		H M L
International Justice Mission	\$ 579,000		H M L
Texas Public Policy Foundation	\$ 564,273		H M L
Liberty Institute	\$ 286,000		H M L
Samaritan's Purse	\$ 275,000		H M L
Alzheimer's Association	\$ 209,260		H M L
Show Hope	\$ 173,200		H M L
Fort Worth Zoo	\$ 150,000		H M L
Dallas Arboretum	\$ 130,000		H M L
Good News Jail & Prison Ministries	\$ 126,500		H M L

## Overall Giving Trends: Overview of how your giving has changed, 2015 - 2020

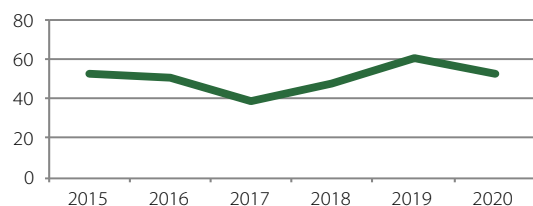
Total Gifts, 2015-2020



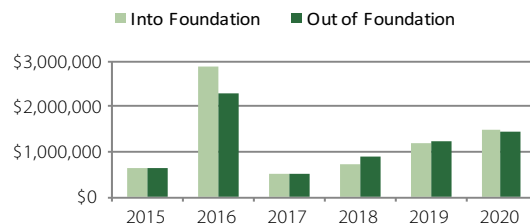
Year Total Gifts Orgs Supported

Year	Total Gifts	Orgs Supported
2015	\$ 692,750	53
2016	\$ 2,895,253	51
2017	\$ 577,615	39
2018	\$ 715,537	48
2019	\$ 1,205,426	60
2020	\$ 1,509,850	53

Number of Organizations Supported Annually



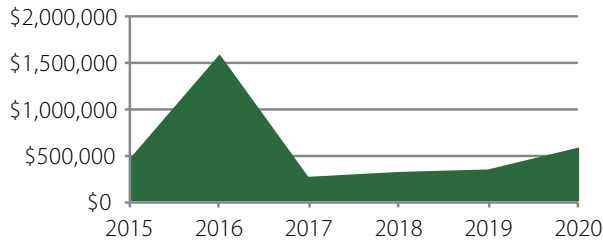
Foundation Activity



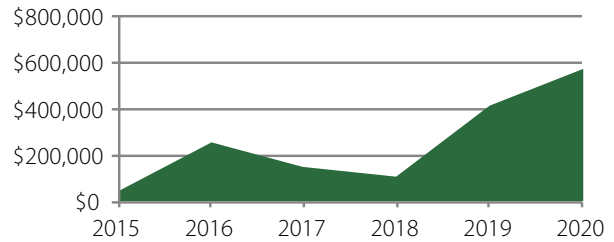
## Prepared for **Smith Family** by **Excellence in Giving**

### Category Trends: Overview of how your giving has changed in each category, 2015-2020

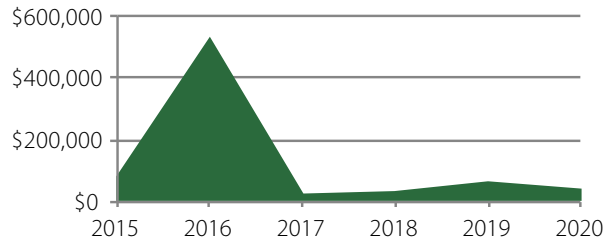
**Healthcare:** \$3,641,994



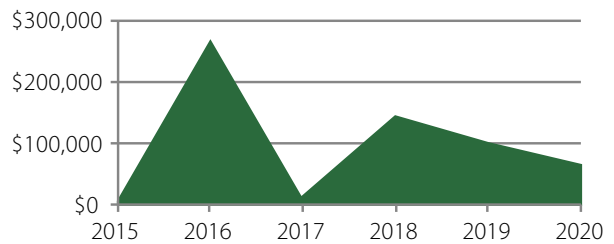
**Advocacy & Public Policy:** \$1,567,775



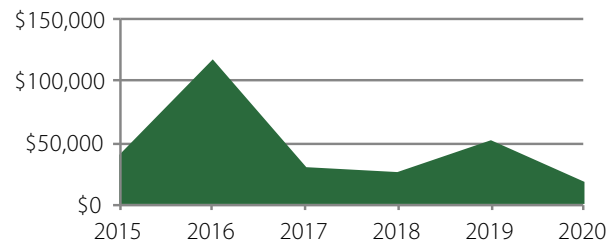
**Education:** \$788,481



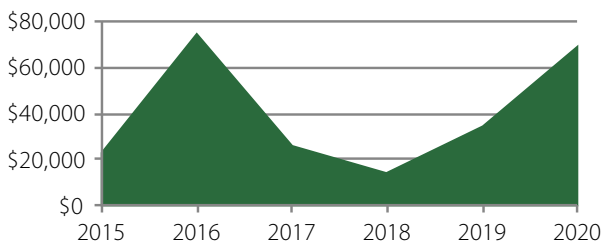
**Humanitarian/Mercy Ministry:** \$602,965



**Environment/Animals:** \$285,750



**Personal/Social Development:** \$244,200



### Overall Giving Trends: Overview of giving by program area, 2015 - 2020

	2015	2016	2017	2018	2019	2020	Total
Healthcare	473,950	1,606,075	269,800	333,750	359,000	599,419	3,641,994
Advocacy & Public Policy	50,400	260,205	154,990	106,925	417,732	577,523	1,567,775
Education	85,000	534,898	28,250	35,142	65,578	39,613	788,481
Humanitarian/Mercy Ministry	7,050	267,200	13,750	145,170	102,800	66,995	602,965
Environment/Animals	39,500	117,750	30,100	27,150	51,750	19,500	285,750
Personal/Social Development	23,400	75,400	26,000	15,150	34,750	69,500	244,200
Adoption/Foster/Orphan Care	2,700	3,000	27,700	25,250	100,000	75,000	233,650
Evangelism/Discipleship	0	30,250	25,000	25,000	36,816	51,000	168,066
Community Development	0	0	0	500	23,500	10,000	34,000
Arts/Media	3,000	100	2,000	1,000	8,000	1,000	15,100
Social Justice	7,750	125	25	500	0	0	8,400
Support Services	0	250	0	0	5,500	300	6,050
<b>Total</b>	<b>\$ 692,750</b>	<b>\$ 2,895,253</b>	<b>\$ 577,615</b>	<b>\$ 715,537</b>	<b>\$ 1,205,426</b>	<b>\$ 1,509,850</b>	<b>\$ 7,596,431</b>

# EVALUATION

Review giving history and take a closer look at nonprofits you want to support. Define the focus, scope, and priorities of future giving.

**“I love the color-coded report! As a donor, I’ve never been given so much insight before making a giving decision.”**

**Laurie L. - TX Client**

SAMPLE DELIVERABLES



## Plant With Purpose (PWP) Evaluation



strength





caution





weakness



### STRATEGY

-  **Measurable Targets.** By FY2022, PWP plans to "form 821 Purpose Groups, adding 108,987 people" served. By FY2025, PWP plans to "increase from 307,460 clients served to 750,000" and "grow from planting 6 million trees a year to 13 million." Specific, numerical targets serve as a measuring stick against which the organization can assess progress. The expansion goals would be made stronger if they were paired with program quality targets.
-  **Geographic Focus.** PWP serves clients through partnerships in Burundi, DRC, Ethiopia, Tanzania, the DR, Haiti, Mexico, and Thailand. PWP leadership must either spend extensive time and money to provide effective oversight across 3 continents in countries with vastly different cultures and languages or risk limited program implementation knowledge. PWP is exploring expansion to Malawi.



### LEADERSHIP

-  **Accountability Structure.** PWP's Board has approved an up-to-date strategic plan against which it can assess the organization's progress. The CEO and staff are evaluated annually. PWP is subject to independent financial audits and written financial controls. The accountability structure would be even stronger if PWP enforced its term limit policy and did not allow the CEO a Board vote.
-  **Active and Supportive Board.** PWP's gender-diverse 12-member Board meets quarterly and works in 4 committees. The Board provided 5% of gift income in FY2020.

### IMPACT

-  **Tracking Investments and Savings.** PWP families served from 2018-2020 have saved enough to cover about 2.5 months of expenses. And clients "saved \$7.4MM in total equity in FY2021 with a 19% return." Participation in savings increases as clients become more involved with PWP. Clients "were twice as likely to save when in Purpose Groups for 3 or more years." Cash reserves are crucial for low-income households to be able to cover unexpected costs like medical emergencies.
-  **Improved Client Outcomes.** PWP surveyed 4,225 families served between 2018-2020 and found that they "experienced a 55% reduction in poverty." 89% applied "more regenerative agriculture techniques," and families experienced a "37% growth in crop yields." Increased income led to educational opportunities for girls as 18% of families were "more likely to send their girls to secondary school."

### FINANCES

-  **Financial Position & Management.** PWP's annual income fluctuates because major funders have made multi-year commitments that are recorded as revenue upfront – like a \$3.2M pledge in FY2018. But PWP has consistently invested more into its programs with each passing year while maintaining a healthy financial position. PWP has 3-6 months of cash on hand and 83% reserve coverage.
-  **Recent Donor Growth.** PWP's donor base grew by 69% from 1,511 donors in FY2020 to 2,554 in FY2021. A growing donor base should allow PWP to rely less on its largest funders – 19% of gift income came from one donor in FY2021. PWP spent a reasonable 13 cents to raise each dollar in FY2021, but fundraising costs have doubled since FY2018. PWP will need to balance its desire for a larger donor base with more tempered fundraising cost growth in future years to remain reasonably cost-efficient.



# Nonprofit Analytics

## GENERAL

Organization Name	Floresta USA, Inc. - dba Plant With Purpose			U.S. Tax ID#	33-0052976	Year Founded	1984
HQ Street Address	4747 Morena Blvd., Suite 100			City & State	San Diego CA	Zip	92117
Phone	858.274.3178	HQ Nation	United States	Website(s)	www.plantwithpurpose.org		
Primary Contact & Title	Corbyn Small, Development Director			Contact Email	corbyn@plantwithpurpose.org		
Organization Type	Independent Public Charity		Annual Report Link	https://plantwithpurpose.org/about/financials/			
Nonprofit Accountability Listings	<input type="checkbox"/> BBB (give.org)	<input type="checkbox"/> Charity Navigator	Strategic Partners	Global EverGreening Alliance, local universities and schools, 745 church partners across the US and our partner countries, HOPE International			
	<input type="checkbox"/> Guidestar	<input type="checkbox"/> Charity Watch					
	<input type="checkbox"/> ECFA	<input type="checkbox"/> Ministry Watch					
Primary Program Area	Poverty Alleviation		Peer Group	Tear Fund, Trees for the Future, HOPE International, World Vision			
Other Program Area(s)	Agricultural Development		Clients Served	Rural Poor			

## GROWTH TRENDS

	FY 2018	FY 2019	FY 2020	FY 2021	% Change	Explanation
Paid Staff (FTE)	18.0	18.0	21.0	24.0	33 %	US & Canada only (N/I ~250 FT nat'l staff in 8 countries)
Clients Served	189,382	200,185	221,937	307,460	62 %	Family members
Annual Income	\$8,213,827	\$5,567,740	\$4,855,759	\$7,448,827	9 %	Fluctuates with multi-year pledges. \$3.2MM pledge FY18.
Donors	1,403	1,441	1,511	2,554	82 %	Marketing efforts and expansion of national footprint
Key Activity	4,593,337	4,996,013	4,724,570	6,002,001	31 %	Trees planted (help soil, diversify incomes, build resilience)

## FUNDRAISING

Donor Retention Rate	58 %	Gov't Funding %	0 %	Cost to Raise \$1 (NOT "GK")	\$ 0.13	Self-sustainability %	0%
Largest Gift for FY2021	\$1,397,014	Reliance on Largest Gift	19%	Last Capital Campaign	2015 - 2018	Endowment Fund	\$83,274
Donors Listed by Gift Size for FY 2021	Gift Size:	< \$1,000	\$1K - 4,999	\$5K - 24,999	\$25K - 49,999	\$50K - 99,999	\$100,000 +
	# of Donors:	2,110	275	120	21	14	14
	Total Amount:	\$ 279,554	\$ 500,682	\$ 1,179,522	\$ 697,410	\$ 861,381	\$ 3,904,178

## FINANCIAL MANAGEMENT

Cash & Equivalents on Hand	3-6 Months		Near-term Expendable Net Assets	\$5,465,907		Total Current Debt	\$0					
Written Financial Controls	<input checked="" type="radio"/> Yes <input type="radio"/> No		Independent Financial Audits	<input checked="" type="radio"/> Yes <input type="radio"/> No		Reserve Coverage %	83%					
Earned Revenue Sources	Investment Income			Primary Types of GIK					N/A			
FISCAL YEAR		FY 2018	FY 2019	FY 2020	FY 2021	2022	<input checked="" type="radio"/> BUDGET	2018-2021				
07/01 TO 06/30							<input type="radio"/> ACTUALS	FY TRENDS				
INCOME	Earned Revenue	\$6,226	\$20,854	\$23,192	\$26,100	\$25,000		319 %				
	Gifts in Kind	\$0	\$0	\$0	\$0	\$0		%				
	Cash Donations	\$8,207,601	\$5,546,886	\$4,832,567	\$7,422,727	\$9,475,000		10 %				
	Total Income	\$8,213,827	\$5,567,740	\$4,855,759	\$7,448,827	\$9,500,000		9 %				
EXPENSES	Program Services	\$3,490,659	81 %	\$3,825,944	81 %	\$4,218,460	79 %	\$5,079,616	78 %	\$7,429,000	79 %	46 %
	Administrative	\$350,816	8 %	\$331,933	7 %	\$467,013	9 %	\$542,282	8 %	\$846,000	9 %	55 %
	Fundraising	\$461,888	11 %	\$551,162	12 %	\$645,162	12 %	\$929,283	14 %	\$1,129,000	12 %	101 %
	Total Expenses	\$4,303,363		\$4,709,039		\$5,330,635		\$6,551,181		\$9,404,000		52 %
SURPLUS/DEFICIT		\$3,910,464		\$858,701		\$474,876		\$897,646		\$96,000		

LEADERSHIP						*Total Volunteers reflective of US only	
CEO Name & Tenure	Scott Sabin		26 yrs	CEO Age	50-59 yrs	Total CEO Compensation	\$ 158,151
CEO Annual Evaluation	<input checked="" type="radio"/> Yes <input type="radio"/> No	CEO has Board Vote	<input checked="" type="radio"/> Yes <input type="radio"/> No	CEO Successor Identified	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Total Paid Staff by Type	FT: 25 PT: 4	Staff Turnover Rate	3 %	Total Volunteers*	47		
Yearly Staff Evaluations	<input checked="" type="radio"/> Yes <input type="radio"/> No	CEO Direct Reports	2 staff	Annual Board Meetings	4		
Board Chair & Tenure	John Steel		8 yrs	Board Size	12	Board Gender Diversity	Men:8 Women:4
Donation % from Board	7 %	Board Committees	4	Term Length	3 yrs	Consecutive Term Limits	2 terms
Additional Advisory or Development Board	<input checked="" type="radio"/> Yes <input type="radio"/> No		Number of Board Members Related to the CEO		0		

### STRATEGY

MISSION	Plant With Purpose, a Christian nonprofit organization, reverses poverty and deforestation around the world by transforming the lives of the rural poor.						
CLIENTS SERVED	We serve marginalized farming families who depend on the land for a living but cannot produce what they need due to the impact of environmental degradation and poverty. These families are often overlooked and underestimated.					LENGTH of Primary Client Relationships	8 Year(s)
The PROBLEM	Disempowerment and a lack of access to financial tools exacerbate environmental degradation and poverty, leaving families without choices and in a downward cycle. 84% of the economically poorest people in the world are rural and depend on land that is increasingly under strain (MPI poor).						
Your SOLUTION	We empower families to be the change their community needs. We restore hope through discipleship, reverse the cycle of environmental degradation with regenerative land management techniques, and equip families to grow out of poverty through savings groups (Purpose Groups) and business development.						
1-3 year PLAN	1.) Rapidly expand our model of environmental restoration, economic development, and spiritual renewal annually. 2.) In FY 2022, we will form 821 Purpose Groups, adding 108,987 people to the number of clients served. 3.) By FYE 2024, we plan to serve 750,000 clients, plant 13 million trees a year, and increase our budget to \$16 million.						
Up-to-date Board-approved STRATEGIC PLAN	<input checked="" type="radio"/> Yes <input type="radio"/> No		CUT (or Modified) PROGRAM in last 3 years for bad results		<input checked="" type="radio"/> Yes <input type="radio"/> No		

### IMPACT

Long-term VISION	To eradicate rural poverty by addressing its root causes everywhere we work. We will restore hundreds of watersheds to foster healthy farms and families, inspire hope rooted in the faith and knowledge of Jesus Christ, and equip families with financial tools like savings and credit.						
RESULTS Report outcomes not activities	(I.) A survey of 4,225 PWP families served in 2018-2020, as compared to non-participants, showed they: 1.) Experienced a 55% reduction in poverty. 2.) Were twice as likely to save when in Purpose Groups for 3 or more years. 3.) Saved ~2.5 months in expenses, with \$7.4MM in total equity saved in FY 2021 (a 19% return). 4.) Applied 89% more regenerative agriculture techniques—leading to a 37% growth in crop yields. 5.) Were 18% more likely to send their girls to secondary school. (II.) In the last 3 years, the change in tree cover where we work positively diverged from global negative trends by 2.7%, and ~2.2 million acres of land are now protected or restored. (III.) 64 Purpose Groups graduated in FY 2021 (332 to date).						
Measure outcomes against benchmarks	<input checked="" type="radio"/> Yes <input type="radio"/> No	Track Key Performance Indicators	<input checked="" type="radio"/> Yes <input type="radio"/> No	Completed independent impact evaluation	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Completed program logic model(s)	<input checked="" type="radio"/> Yes <input type="radio"/> No	Survey program beneficiaries	<input checked="" type="radio"/> Yes <input type="radio"/> No	Conducted randomized controlled trial (RCT)	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Impact STORY	Veronika, a single mother in the DRC, was abandoned by her husband after a disease left her disabled & caused her to lose one of her eyes. She shares, "I was a cursed person, without hope. Then I joined a Purpose Group, began saving money, and started a business." Through her group, she shares, "my children have gone back to school, and I've found value and dignity; my life has completely changed."						
Recent Program IMPROVEMENT	Our watershed model centers our social and environmental efforts to: maximize benefits to participants and non-participants, greatly reduce operational costs, and improve scalability. We are now rapidly expanding our work in priority/key watersheds across every country where we operate.						

### GEOGRAPHY

Where do your programs operate?  Local  Regional  National (USA)  International (List nations or regions served below alphabetically)

Plant With Purpose's programs are located in Burundi, the Democratic Republic of the Congo, Dominican Republic, Ethiopia, Haiti, Mexico, Tanzania, and Thailand. PWP is also currently exploring an expansion to Malawi.

### S.W.O.T. ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
- 36+ years of experience - A proven model that is backed by multiple short- and long-term studies - Strong community participation and support from churches, governments, etc.	- Our holistic program is difficult to explain quickly to the mass market - often oversimplified to "just a tree planting" org - Environmental change and community development takes time (6 to 10 years)	- Watershed model allows scalability - Environment funders realizing the importance of our holistic approach - Supporters come from across the political spectrum & we often bring unity	- Well-intentioned charity gov't/handouts that undercut long-term empowerment - Political, environmental, and external volatility in the areas where we work can slow progress

SOURCE	Completed By: <b>Corbyn Small</b>	Date: <b>11/04/2021</b>
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# PARTICIPATION

Confidently execute your personalized giving strategy with the Excellence in Giving team.

**“Martha Lu and I have grown a great deal in our joy, strategic approach and unity in our giving since beginning to work with you, and we want to thank you and your organization for being such a blessing in our lives.”**

**Kurt K. - CT Client**

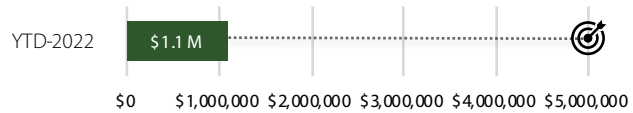
SAMPLE DELIVERABLES

# Giving Dashboard

Prepared for the **Smith Family** by **Excellence in Giving**

## GIVING OVERVIEW

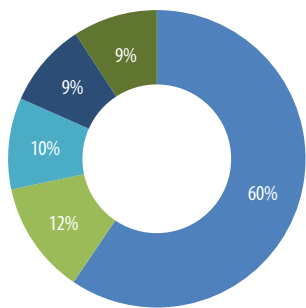
YTD-2022 Total Giving	\$1,089,120
YTD-2022 Total Nonprofits	7
5-Year Total Giving	\$16,994,258



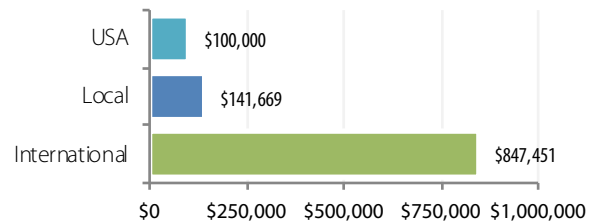
## YTD-2022 TOP GRANT RECIPIENTS

Organization	Amount	Purpose	Topic
Kingdom Giving Fund I	\$647,451	Seed Effect	Economic Development
Care Net	\$100,000	General Support	Evangelism/Discipleship
CURE International	\$100,000	General Support	Healthcare
Love Justice International	\$100,000	General Support	Social Justice
The Mentoring Alliance	\$83,336	General Support	Personal/Social Development
Children's Advocacy Center	\$50,000	The Building Project	Personal/Social Development
Centrepont Ministries	\$8,333	General Support	Evangelism/Discipleship

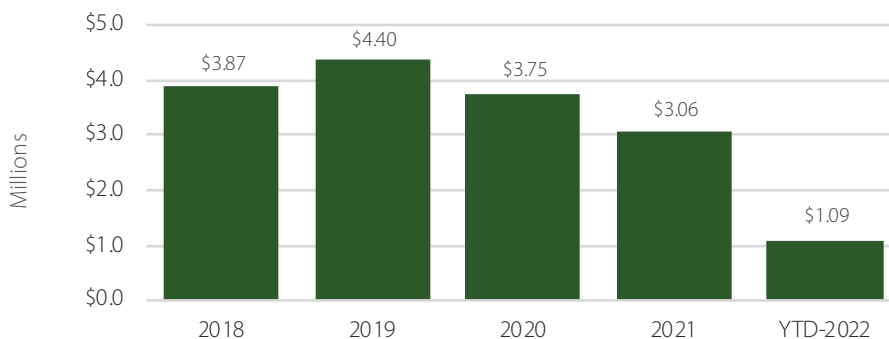
## YTD-2022 GIVING BY TOPIC AND GEOGRAPHY



Topic	Amount
Economic Development	\$647,451
Personal/Social Development	\$133,336
Evangelism/Discipleship	\$108,333
Healthcare	\$100,000
Social Justice	\$100,000
<b>Total</b>	<b>\$1,089,120</b>



## 5-YEAR GIVING HISTORY



Year	Amount
2018	\$3,870,000
2019	\$4,396,559
2020	\$3,746,562
2021	\$3,061,516
YTD-2022	\$1,089,120
<b>Total</b>	<b>\$16,163,758</b>

# Giving Forecast



Prepared for the **Smith Family** by **Excellence in Giving**

ORGANIZATION	2020	2021	2022	2022-SCH	2023-SCH	NOTES
Kingdom Giving Fund I	\$1,273,405	\$493,277	\$647,451	\$352,549		Awana/Prison Fellowship International
Care Net	\$0	\$0	\$100,000			Anonymous
CURE International	\$0	\$0	\$100,000			Anonymous
Love Justice International	\$0	\$0	\$100,000			Anonymous
The Mentoring Alliance	\$252,508	\$250,008	\$83,336	\$166,664		\$250k/yr 2020-2022
Children's Advocacy Center	\$67,500	\$65,000	\$50,000	\$15,000	\$65,000	\$50k/yr for capital campaign; \$15k/yr medical exam prog.
Centrepont Ministries	\$25,000	\$25,000	\$8,333			\$2,083.33/mo
University of Texas at Tyler	\$625,000	\$625,000	\$0	\$625,000	\$600,000	\$600k/yr 2019-2023; \$25k/yr for BGC scholarships 2020-2022
International Justice Mission	\$500,000	\$250,000	\$0			
Global Catalytic Ministries	\$0	\$250,000	\$0			Anonymous/One-time Relief
Lifewater International	\$0	\$250,000	\$0			
The Samaritan Women	\$100,000	\$203,400	\$0	\$203,400	\$217,280	
Empart	\$123,000	\$150,000	\$0			Anonymous/COVID 19 Relief
Young Life Africa	\$105,000	\$105,000	\$0			
Buckner Children & Family Services	\$115,000	\$100,000	\$0			
Free Burma Rangers	\$0	\$100,000	\$0			
The Global Orphan Project	\$0	\$75,000	\$0			Anonymous
Young Life Tyler	\$41,500	\$37,500	\$0	\$25,000		\$25k/yr 2020-2022
Hospice of East Texas	\$25,000	\$27,500	\$0			
Promise Academy	\$25,000	\$25,000	\$0	\$25,000		\$25k/yr 2020-2022
The Gathering	\$199	\$13,992	\$0			
NCF	\$12,950	\$10,839	\$0			
Young Life Camp Lonehollow	\$250,000	\$0	\$0			
Axis	\$100,000	\$0	\$0			
Human Coalition	\$100,000	\$0	\$0			
<b>Total</b>	<b>\$3,741,062</b>	<b>\$3,056,516</b>	<b>\$1,089,120</b>	<b>\$1,412,613</b>	<b>\$882,280</b>	

**2022 Projected Giving:**

**\$2,501,733**

**Annual Grant Goal:**

**\$5,000,000**

# CELEBRATION

Witness the results of high impact giving and experience the joy of generosity.

**“Being able to do this joyfully would not be possible without Excellence in Giving. We could not be successful in our grant making without you.”**

**Paul K. - CT Client**

SAMPLE DELIVERABLES

## IMPACT REPORT FOR **FOOD FOR THE HUNGRY**

\$100,000 gift made in January 2021



### **GRANT PURPOSE**

**To provide opportunities for youth and families in the Ixil region in Quiché, Guatemala to complete middle and high school education**

The COVID-19 pandemic and hurricanes generated difficult conditions for families in the Ixil region this year. In the midst of it all, this project reached many students who would have dropped out of their studies. Food for the Hungry worked hard to stay in constant contact with families to expand and reinforce biblical world-view trainings, reminding them that God's plans for them are good. Thus far, 1,210 students have been impacted, as well as parents and community leaders who are now empowered to support the dreams of their youth.



Miriam Susana receiving a visit from Food for the Hungry.

**Only 20% of adolescents and youth in the Ixil region have access to secondary education opportunities.**



### **PERSONAL STORY**

Miriam Susana Gómez Pérez is a student at the nursing school who is passionate about using her profession to live out God's calling on her life to serve her community! She said, "Thank you for the opportunity to be a part of the scholarship program this year. I hope that God blesses you and the other students! I appreciate the spiritual and financial support each month, as well as the motivation and visits that I've received from the Food for the Hungry staff. The support they give me emotionally to achieve my dreams is so valuable." Susana dreams of graduating as a nurse assistant, with a desire to serve her neighbors and pursue a university degree in medicine. She is embracing God's plans for her life and looking to the future with great expectancy and hope!

### **THANK YOU**

Food for the Hungry is so thankful for your love for Ixil families! Amidst the hard times this past year, this project has reinforced trainings, displaying the hope and provision of God to the youth and their families. It is an honor for us to be channels of blessing through your generous contribution. Thank you for being a blessing!

## **RESULTS**

### **1,000 SCHOLAR KITS ISSUED**

1,000 middle school students have been directly supported and impacted by this project through the distribution of scholar kits and expanded access to community trainings.

### **210 SCHOLARSHIPS PROVIDED**

In 2020, 210 high school students received scholarships enabling them to continue their studies. Their families received training on the importance of education through a biblical world-view.



# SERVICE TRIPS

How do you help the next generation understand international charitable giving? **...show them!**

Excellence in Giving creates customized trips for client families who have interest in global causes. Trips are more comprehensive than typical donor "vision trips" that major international organizations organize.

Excellence in Giving clients see projects in places that are selected with the family's priorities in mind. Each trip is customized for your family and includes a client defined blend of (1) education, (2) service, and (3) fun.

## Education

Learn about cultural dynamics in communities around the world

Expose your family to global challenges and understand the solutions being offered

## Service

Observe organizations effectively meeting community needs

Participate in service projects in partnership with local organizations

Experience the satisfaction of making a difference in someone's life

## Fun

Visit internationally renowned hotels, restaurants, and entertainment venues

All you have to do is show up! Excellence in Giving, LLC provides everything you need:

Customized trip itinerary

Pre-trip instructions

Excellence in Giving trip guide

Personalized trip journals

Knowledge of best-in-class international programs

## BENEFITS

- Meet the people whose lives are improved by your gift
- Expose your family to the world's needs and learn the most effective ways to help
- Create lasting family memories through exciting adventures and service projects

Excellence in Giving organizes trips for the families we serve on a regular basis. Clients are guaranteed the most highly recommended and safest accommodations and transportation that each country has to offer. In the last few years, Excellence in giving has planned and successfully executed a number of client trips, including:

## 4-Day Dominican Republic Trip

- Meet with children and families whose lives have been radically improved through your giving
- See how micro-finance, water purification, and sustainable agriculture is changing lives
- Install fuel-efficient stoves in poor households to reduce respiratory illness and fuel costs
- Create lasting family memories through exciting adventures and service projects

## 6-Day Kenya Trip

- Meet with children and families whose lives have been radically improved through your giving
- See how micro-finance, micro-franchises, and livestock empowerment programs change lives
- Kids play soccer with African children at holistic sports outreach center and come to love them
- Experience an African safari and then the Atlantis resort in Dubai on the way home

## 8-Day India Trip

- Meet with children and families whose lives have been radically improved through your giving
- See how medical kiosks, private education, and economic empowerment programs change lives
- Kids ask questions and witness firsthand the philanthropic values of their parents
- See the Taj Mahal, watch snake charmers in action, and visit the famous Ganges River



# EXCELLENCE IN GIVING TEAM

## AL MUELLER *President*



Mr. Mueller founded Excellence in Giving in 2001 after 20 years of providing investment advice to major institutions and wealthy families. During his career at Morgan Stanley and UBS, Mr. Mueller evaluated investments in virtually every asset class. His clients relied on his ability to evaluate risk and reward of the investments in their portfolio. Mr. Mueller used his investment background to launch excellence in Giving with a desire to help clients achieve high-performing philanthropic portfolios. The world-class team that Mr. Mueller assembled has been acknowledged as the premier provider of advice for values-based giving. Since 2001, Mr. Mueller and his team have advised their retained clients on over \$400 million of charitable gifts. The Excellence in Giving clients give with great confidence and are able to celebrate the results of their gifts. Al's proven service and advice to families makes him one of the most respected and sought-after thought leaders in philanthropy today. Mr. Mueller played football at Brown University, graduated from the University of Arizona, and holds an MBA from the Anderson School of Management at UCLA. He and his wife, Susan, have three adult children. Al and Susan appreciate the challenging game of golf, mountain adventures, and ski slopes that the Rocky Mountains provide.

## THOR IVERSON *Chief Financial Officer*

Mr. Iverson brings a personal and professional passion for wise stewardship and high-impact giving to the role, having served as chief financial officer for family-owned businesses with high capacity, philanthropic owners. Thor brings more than 20 years of senior management experience to Excellence in Giving including executive positions at Echelon Corporation, BeAtHome.com, Amity Technology, Concord, Inc., and Great Plains Software. Mr. Iverson's professional experience includes extensive international business in Russia, Ukraine, and Scandinavia. He received his MBA from Stanford University and his B.S. in Computer Science and Business Administration from North Dakota State University. Mr. Iverson is a published author and a patent holder. He lives in Colorado Springs with his wife Dana and their two children.



## KEITH WAGGONER *Regional Philanthropy Advisor, Texas*

During his 30 plus year career, Mr. Waggoner has gained expertise in leading teams of people, building relationships, developing processes to achieve a vision, honing entrepreneurial skills, and transitioning organizations in need of change. He began his career in real estate and spent time developing his commercial real estate skills. In 1997, he joined Macfarlan Real Estate Investment Management where he was responsible for all of the firm's commercial asset management and corporate operations. He helped launch nonprofit Behind Every Door Ministries, Inc in 2009. Behind Every Door combined private real estate investment partnerships, which purchased C-grade apartment communities, with a nonprofit entity for the purpose of improving the lives of the residents and transforming communities. Keith was born in Little Rock, Arkansas and raised in Wheaton, Illinois. He moved to Texas to pursue his Bachelor's degree in business at Baylor University and holds his MBA from Southern Methodist University. Keith is an avid golfer, enjoys photography, and tries to find time to read good books. He lives in Dallas with his wife and has two grown children.



## PAUL PENLEY, PH.D

*Managing Director, Research Division*

Dr. Penley manages the company's research division and leads projects to inform effective grantmaking strategies. He has refined methods for nonprofit due diligence and tracking post-grant impact. He has completed on-site evaluations in a dozen countries around the world. Dr. Penley specializes in creating outcome measurement systems for internal and external reporting of program effectiveness. He has presented his approach at community foundations, Philanthropy Roundtable meetings, and Yale Philanthropy Conference. He has published research insights in *Alliance* magazine, *Planned Giving Today*, and *OUTCOMES* magazine. Dr. Penley designed the firm's Community Assessments and Strategic Gap Analyses so clients can find and fund charities that fill strategic gaps and get results. He created our charity evaluation platform and analytics where subscribers can assess nonprofit performance and impact using up-to-date, in-depth data. Paul is a published author, an avid blogger with 60,000 readers, and an adjunct professor. He resides in Colorado Springs with his family where he enjoys fly fishing the endless trout streams in Colorado.



## JESSICA BOCKER

*Managing Director, Client Services*

Mrs. Bocker leads the Client Services initiative to support each client's unique giving passions and priorities. She brings diverse experience in operations management, customer service, marketing, public relations and human resources. Jessica served as Vice President of Operations and Marketing at Biowatch Medical, a medical device and service company headquartered in Columbia, SC. In this position, she was effective in improving the quality of customer service and scaling the company's operational capacity. Jessica joined Excellence in Giving in 2011 to help ensure that every client experiences the joy and significance of giving well. Jessica is a graduate of the University of South Carolina where she studied English and French. She studied in France and expanded her understanding of international culture with visits to a dozen other European countries. She lives in Colorado Springs with her husband and two young children where they enjoy time as a family and being outdoors.



## JEDD SCHROY

*Director of Evaluation*

Mr. Schroy is a gifted leader, an optimist, and a builder of people and processes that deliver results. He began his career in financial services before co-founding an organization developing African entrepreneurs. Determined tenacity, strategic analysis, problem solving, capacity building and creative thinking have been hallmarks of his career. Jedd joined Excellence in Giving in 2019 to contribute to the success of clients and organizations investing in the most pressing and important work of our time. Jedd has traveled, worked and served in more than 40 countries. He is a graduate of Oral Roberts University with a degree in International Relations and Business Administration. Jedd is a published author, speaker, and lifelong learner. His favorite topics are economics, redemptive entrepreneurship, and theology. A native of California, he still calls it home in his heart. Jedd loves traveling with his wife and four daughters. He enjoys photography, storytelling, and traveling.





# EXCELLENCE IN GIVING TEAM

## RACHEL TOMLIN

*Senior Client Services Advisor*



Rachel Tomlin is eager to support clients and relationship managers through project management with the goal of total client satisfaction. Rachel has a passion for people, communities, and impact. Prior to her work at Excellence in Giving, Rachel worked with various nonprofits and social impact businesses where she discovered her heart for advocacy and public policy. She brings experience in nonprofit leadership, grant management, and start-up entrepreneurship. She received her bachelors degree from Hope College and is currently pursuing her MBA at Colorado State University. Originally from Northern Michigan, Rachel lived briefly in England and is now happily settled in Colorado. In her spare time, you can find her outside, running, or hanging out with her two golden retrievers, Dani and Leela.

## MATT ASPEGREN

*Investment Officer, Kingdom Giving Fund*

As an Investment Officer for Kingdom Giving Fund, Mr. Aspegren performs in-depth research on nonprofit organizations to help investors give strategically while nonprofits they support get even better. Mr. Aspegren has served as nonprofit founder, chief executive, board member, consultant, and evaluator before joining Excellence in Giving. Mr. Aspegren briefly worked as a corporate analyst before moving to the Philippines in 2009 to join IJM's Project Lantern, funded by the Gates Foundation. In 2010, he co-founded international human rights agency, 10ThousandWindows, where he served as CEO for six years and as a board member for seven. Mr. Aspegren earned a degree in Business Administration and Psychology from John Brown University. Matt was awarded one of four annual graduate fellowships from Soderquist Leadership to complete an MBA. Matt lives with his wife and daughter in Austin, TX, where he enjoys his family and all things sports.



## MARCUS BRUBAKER

*Client Service Associate*



Mr. Brubaker supports the Client Services team to serve clients through project management, grant-management, administration, and special projects. A native of Casper, Wyoming, Mr. Brubaker graduated from Hillsdale College with a BA in History and subsequently earned a Masters in Modern History from Oxford University, England, and a Masters in International Security Studies from the University of St. Andrews in Scotland. Mr. Brubaker worked for four Members of Congress, both in Washington, DC and in a local district office. He specialized in issues before the House Committee on Financial Services and the House Committee on Science, Space, and Technology before his promotion to chief of staff. Prior to Excellence in Giving, Mr. Brubaker worked in a startup classical charter school as an assistant principal and history teacher. Marcus lives in Colorado Springs with his wife, son, a rescued border collie, and a west highland terrier.



## LEXI PETERSON

*Senior Client Service Advisor*

Lexi Peterson is thrilled to support clients and the President through project and grant management with the goal of total client satisfaction. Lexi joined the Excellence in Giving team as a Client Services Assistant from 2015 through 2018, both at our Headquarters in Colorado Springs and in Dallas. She then spent 3 years working at Southwest in their world-class Customer Service department, managing a team in the executive office before rejoining the Excellence in Giving team. Lexi brings experience in Higher Education Academic Affairs from her time working at Texas Christian University in the John V. Roach Honors College and serving for numerous programs within Student Development Services. Lexi, a native and proud Texan, is a graduate of Texas Christian University, where she earned a Bachelor of Science in Psychology. After participating in a mission trip to Uganda and spending time studying in Germany, Switzerland, Italy, Turkey, Costa Rica and England, she has developed a true love for travel.



## JACOB MCCLURE

*Senior Research Associate*

Mr. McClure has collected and analyzed data for topical research, community assessments, and impact measurement at Excellence in Giving since 2015. His duties include managing, updating, and providing quality control for the company's nonprofit analytics database, which assesses the health and performance of many diversified charities. Jacob maintains strong relationships with nonprofit leaders and helps them enter all data points in the analytics form clearly and accurately. Jacob earned his Bachelor's of Science degree in Business Administration at the University of North Carolina in 2015. He attained a Graduate Certificate in Nonprofit Management at the University of Colorado in 2018 and is currently pursuing a Master's degree in Public Administration. Outside of work, Jacob enjoys hiking, running, and biking on the trails of Colorado Springs, and spending time with his Siberian Husky, Mia.



## TIM VAN VUGT

*Research Analyst*

Mr. Van Vugt sets up systems to measure program outcomes for charities that Excellence in Giving clients support. He specializes in designing research plans and analyzing impact data to evaluate program effectiveness and recommend improvements. Mr. Van Vugt earned a BA in Finance from Calvin College and an MA in International & Development Economics from the University of San Francisco. He began his career in Kenya working with microfinance institutions and has extensive experience with a variety of international development organizations and social enterprises around the world. Before joining Excellence in Giving, Mr. Van Vugt worked as an independent consultant, helping nonprofits better measure and understand the impact of their programs. He has led rigorous research projects in several countries throughout Africa and Latin America for clients including Compassion International, Living Water International, and Partners Worldwide.



# EXCELLENCE IN GIVING TEAM

## SASHA SWIFT

*Office and Human Resource Manager*



Mrs. Swift serves as the Human Resources and HR Manager for Excellence in Giving, focusing on a positive culture for everyone who steps through our office doors. Her previous experience in law enforcement and municipal government as an Executive Assistant and her certification as an Emergenetics Associate provides a unique perspective on efficiency and teamwork. She has also served in various volunteer positions with organizations ranging from a local Chamber of Commerce to volunteering as a Firefighter and Emergency Medical Responder. Sasha joined Excellence in Giving in 2021 to support our team's communication and effectiveness. Sasha lives in Colorado Springs with her husband, daughter, and two dogs. They love spending time with family and exploring all the beauty Colorado has to offer.

## SEAN BERKERY

*Grant Data Specialist*

Sean Berkery provides our clients with comprehensive reports which help inform and monitor trends in their charitable endeavors. He also manages our database, ensuring data integrity, precision, and the continued development of refreshing perspectives of our reporting capabilities. Before joining our team early in 2022, Sean served several nonprofit organizations throughout Colorado, where he developed his skills in data interpretation, financial stewardship, and report-building. From 2017 to 2020, he managed the foundation-funded contributions of various hospital expansion projects. These include a major renovation of the St. Francis Hospital NICU, expansion of the John Zay Guest House, and equipment furnishing for the state-of-the-art Hybl Center in Colorado Springs. In his free time, Sean plays drums for his band, enjoys climbing, building gaming computers, and spending time with his family and their rescue dog, Levi.



## JESSE CHILDRESS

*Research Associate*



Mr. Childress manages, updates, and provides quality control for the company nonprofit database and maintains strong relationships with nonprofit leaders. His collection of nonprofit performance data allows Excellence in Giving to assess the health and performance of charities our clients care about. Mr. Childress earned a B.A. in Interdisciplinary Studies and an MA in Cultural Apologetics from Houston Baptist University. He has years of experience working in the nonprofit sector and as a writer and is passionate about seeing organizations thrive internally and externally. He has spent time studying in Switzerland and has traveled across a dozen countries in Europe. Born and raised in Texas, he now calls Colorado home. In his spare time, he enjoys reading, writing, cooking, and spending time outdoors.

# Frequently Asked Questions

## *Why do families choose to be Excellence in Giving Clients?*

It's simple, really. Families are drawn to us for three main reasons: our expertise in the philanthropy sector, our client customization, and the increased joy we facilitate in their giving. Our services create a disciplined, yet flexible process for intelligent giving. We help clients prioritize gifts in areas that are important to them and bring them the most joy. Clients give confidently because of the services we provide in due diligence, reporting, and measurable results.

## *When should someone consider becoming an Excellence in Giving client?*

We serve families who seek to maximize the impact of their charitable giving. Our services encompass those typically provided by a foundation executive director. Families who have the capacity to give over \$500,000 annually will find the most benefit from our services.

## *Does Excellence in Giving decide where their clients will give?*

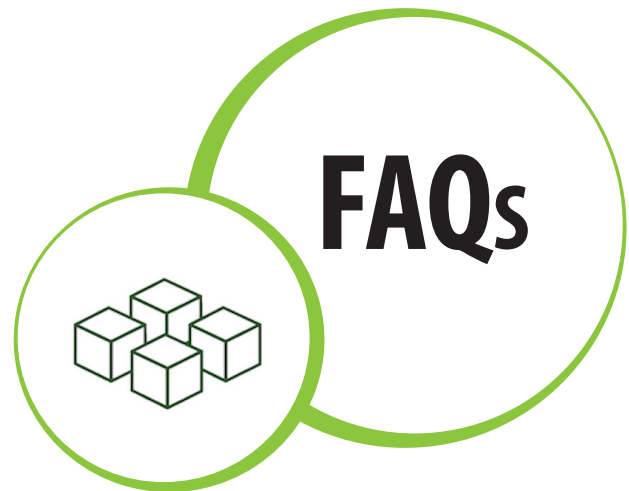
Absolutely not. Our goal is to increase the confidence and the joy our clients experience from their charitable giving. We do that by helping our clients discover the areas and organizations where they are passionate. We are happy to make recommendations on organizations we trust. At the end of the day, we are here to make the process easier and the joy greater.

## *How does Excellence in Giving charge for services?*

We are a fee-only professional services firm. We send a written service agreement with our rates based on projected work effort. Fees can be based on a specific project or on an annual retainer. We don't take a percentage of grants, and we don't charge you more if you give more. We believe in totally satisfied clients, and if our clients aren't totally satisfied we will adjust their bill or provide additional services at no charge. As a bonus, our fees are fully tax-deductible as a legitimate giving expense.

## *Why doesn't Excellence in Giving charge a percentage of charitable giving?*

Alignment of interests. Excellence in Giving never wants clients to think there is any motivation to increase clients' annual giving in order to increase profit. Charging for services rendered is best for all parties and allows clients to have a variable expense they control.



## *How often does Excellence in Giving meet with its clients?*

Our approach is customized to the needs of each client. We recommend at least three client meetings annually to make decisions on grant requests, review grant activities, and celebrate results. Phone calls are scheduled as needed to implement and monitor grant progress. Travel costs for regularly scheduled meetings are included in the full-service engagement.

## *Can Excellence in Giving help me train my children?*

Yes! We believe one of the most important gifts you can give your children is wisdom along with wealth. By involving and educating children of all ages, parents can use family giving as an opportunity to pass on their values and teach lessons of stewardship. This is one of our areas of expertise, and we love to provide education and resources on next generation philanthropy.

## *Why should I pay someone to help me give money away?*

Writing a check is easy; making a lasting impact is difficult. The wealthiest men of this generation have publicly stated that "it is more difficult to give money away intelligently than it was to make it." Sorting through worthy causes and making wise giving decisions is a challenging and time-consuming task. Excellence in Giving provides an unparalleled level of service while offering our clients complete control and freedom in their giving decisions. To sum it all up, through Excellence in Giving, our clients gain confidence in the organizations they support, receive updates on projects, and celebrate the impact their gifts have made.

## HEADQUARTERS

Excellence in Giving, LLC  
830 Tenderfoot Hill Road, Suite 310  
Colorado Springs, CO 80906

719.329.1515  
ExcellenceinGiving.com

## BRANCH OFFICE

Dallas, TX



*Excellence in Giving*  
the joy of generosity