



Optimize Your Giving

Could gifts to your favorite nonprofits do more?

Trevor and Michelle Newman have been retained clients of Excellence in Giving since 2008. In the last ten years, they have benefited greatly from Excellence in Giving's expertise in structuring gifts that get the biggest bang for the buck.

As the Newmans' kids grew older, the family became more engaged philanthropically with the private school they attended.

School Requests Gift for Capital Campaign

During the launch of a capital campaign for the school, Trevor expressed concern at the size of the campaign compared to the capacity of families. He convinced the school board to limit the campaign to \$20 million, and he agreed to commit 10 percent of funds with monitoring by Excellence in Giving.

When the campaign fell short, the school asked him for an additional \$2 million gift. In consultation with Excellence in Giving, Trevor agreed to provide the funds as a recoverable grant, interest free from his foundation.

While the Newmans could choose to forgive the grant, the recoverable structure also gave them the option to recycle the grant for future charitable purposes.

Excellence in Giving worked closely with the Newmans, their donor advised fund, and the school to structure the grant with appropriate terms.

Recoverable Funding Helped Everyone

The year the first payment was due, Excellence in Giving followed up with the headmaster of the school. Excellence in Giving knew that adhering to the original terms of the family's gift would deepen their respect of the school's leadership. So, Excellence in Giving encouraged the headmaster to make payments on time without requesting forgiveness of payments or an additional gift.

\$2
Million

leveraged to maximize the funds available for charitable giving

Excellence in Giving ensured the funds were deposited back to the foundation appropriately and provided the Newmans with a summary of their capacity for additional charitable giving.

Now, in the year of final payment, both the school and the Newman family are happy with results. The Newmans have leveraged capacity to fund additional projects in the future.

“Gifts to our favorite charities are maximized because Excellence in Giving helps us structure the funds and takes away the stress of handling all of the details.”

- Client from Puerto Rico

