



National
Philanthropic
Trust

CASE
STUDY

Corporate-Advised Funds at National Philanthropic Trust

FOR COMPANIES PURSUING CORPORATE SOCIAL RESPONSIBILITY INITIATIVES, a corporate-advised fund offers powerful grantmaking capacity without the time commitment or expense of managing a foundation.

As the charitable sponsor, National Philanthropic Trust (NPT) handles all back-end administration, including accepting and receipting contributions, liquidating gifts of complex assets, managing investments, recordkeeping, tax filing and grantmaking. This comprehensive service model allows corporate donors to focus on pursuing their shared charitable objectives. The flexible model also provides an ideal tool for charitable collaboration between corporations and outside stakeholders. Donors can also access the expertise of NPT's Philanthropic Services team to develop and execute giving strategies.

CASE STUDY: International Reach

An international hotel chain with locations on six continents wanted to make grants in the cities of its high-performing properties.

Opening an advised fund with NPT allowed the corporate donor to recommend grants around the world, using input from its local employees. NPT ensures that each recipient meets IRS and Treasury Department standards and the U.S. Patriot Act's anti-terrorism regulations. The donor is assured that every grant earns the greatest possible tax benefit.

CASE STUDY: Philanthropic Structure

A technology company wanted to leverage its industry expertise to increase access to clean water in vulnerable populations.

By using an advised fund with NPT, the donor grants to NGOs with expertise in the global water crisis to make community-based interventions. The donor regularly utilizes NPT's capacity to enter into complex grant agreements with benchmarking and reporting requirements, allowing the grant to be structured to stipulate expectations for charitable outcomes.

To learn more about corporate-advised funds with National Philanthropic Trust, please call us at (888) 878-7900.

Advised Funds are technically donor-advised funds and are subject to all tax rules applicable to DAFs.