



We Help Successful Families
Become Successful Philanthropists

Achieve Excellence and Gain Fulfillment from
Your Charitable Endeavors





What We Do and **WHAT WE BELIEVE**

At Neithercut Philanthropy Advisors (NPA), we help families achieve excellence and derive fulfillment from their charitable efforts. It is our firmly held belief that philanthropy can be – indeed should be – an exciting and rewarding experience.

We handle the philanthropic affairs for a select group of families and we advise foundations on how to engage in effective philanthropy. By providing our clients with the confidence, direction, and capabilities they need to make a greater impact with their giving, they are able to realize more personal fulfillment from their efforts. In short, NPA helps successful families become successful philanthropists.

The firm was founded in 2005 by Mark Neithercut, who has more than 25 years of experience working with families and foundations. Today, NPA's well rounded team of talented professionals works with individuals, families and foundations to achieve their charitable goals.

Client Challenges and **OUR SOLUTIONS**

Families often begin their philanthropic journey knowing they want to make a positive impact, but they are not sure how to go about it. Or, they have struggled with their giving for a while, and have found that giving money away can be a lot harder than they expected. Through our work, we have had the opportunity to help our clients overcome many of the challenges that families and family foundations face. Based on that experience, we have developed a series of tools that help families no matter what stage they are in, or what challenges they face.

**Are you just getting started
and want to make sure you
are on the right track?**



LAUNCH RIGHT

The long-term success of a family's giving is often determined by the actions it takes – or does not take – early in the process. Just as a house must be built on a strong foundation, successful philanthropy must be built with a set of principles and goals that can help it achieve excellence. From clarifying the family's goals to determining the appropriate charitable vehicles, Launch Right helps our clients be successful with their charitable giving, including launching or repositioning a family foundation if appropriate.

**Is your family or foundation in
transition and struggling with
purpose or direction?**



MISSION BUILDER

Without a sense of purpose, a foundation or other charitable enterprise can go adrift. However, with a clear and effective mission in place a foundation can enact its vision while preserving the intent of its founders. In short, a clearly defined mission serves as a beacon for those leading a foundation – now and for generations to come. Mission Builder helps foundations and their leaders explore, discover, and define values and objectives, resulting in a clear sense of purpose. This unique process avoids time-consuming retreats and focuses on consensus building among all stakeholders.

Are you concerned about making an impact?



STRATEGY BUILDER

Families often have a clear idea of what they want to do, but at times face obstacles in implementing their charitable vision. Effective strategy is the link between mission and impact. Strategy Builder is a systematic approach to develop a philanthropic strategy. Working with a family or a foundation's leadership, we focus on their desired outcomes or impact. As a next step, we identify the appropriate charitable activities that are likely to achieve the outcomes, while identifying the appropriate metrics to track progress and success.

What types of programs will help achieve your goals?



PROGRAM BUILDER

In addition to financial support, families and family foundations can provide other types of support to achieve long-term philanthropic goals. These include engaging in educational, advocacy, convening and values-based investing activities. NPA staff has worked with families and foundations of all types and sizes to design, implement, and manage dozens of grantmaking programs. Program Builder is our process to develop successful philanthropic programs and has been used by our clients to award more than \$150 million in grants.

“I serve as a Trustee of a sizeable private foundation that retained Neithercut Philanthropy Advisors to assess our operations. Even though the Trustees had a great deal of nonprofit experience, the firm identified a number of areas for improvement and has made our foundation more accessible, transparent, targeted, and professional. They did a great job for us and they were very efficient in their use of time. Neithercut Philanthropy Advisors knows foundations inside and out and it shows.”

– David Larsen, Member at Bodman PLC

Are the paperwork and other compliance requirements of a foundation a burden?



BACK-OFFICE ADVANTAGE

Paperwork, recordkeeping and other administrative duties are an important and necessary part of running a foundation. Yet, few families relish the prospect of performing these tasks. There is a better way, one that allows a foundation and its leaders to focus on making a positive impact, while having the peace of mind that the back-office is being well managed. Through the Back-Office Advantage, we offer a full array of administrative services – from due diligence research and recordkeeping to grant processing and compliance monitoring. This can take the headache and hassle out of running a foundation, and ensure that everything is in its proper place for audits and tax returns.

Could you benefit from an outside assessment of your effectiveness, efficiency and risk profile?



PHILANTHROPY FITNESS

Rules and regulations change, laws are updated and operational best practices evolve. Because of the changing landscape, it is important for foundations to review their operations, systems, and processes on a regular basis. Philanthropy Fitness involves a comprehensive, systematic review and analysis of a foundation’s operations. We work with our clients to establish the best practices of modern foundation management in order to ensure effectiveness, promote efficiency and mitigate risk. We also help put in place systems that provide the appropriate accountability for reporting to the Board of Directors, an audit firm, and the IRS.

Our EXPERIENCE

We have worked with families and family foundations of all sizes. A few recent examples of our work include:

William Davidson Foundation

Develop mission statement, grantmaking strategy and procedures; manage back office; manage grantmaking program totaling \$100 million over two years

Ohio Philanthropist

Review series of major gift requests; conduct due diligence; negotiate major gifts of \$200,000 to \$10 million

Kansas Health Foundation

Design and implement \$30 million grant program; monitor program success against metrics; review grant applications

Max M. & Marjorie S. Fisher Foundation

Assess internal operations; develop new grantmaking strategy in two programs; interview board members for strategic planning exercise

Matilda Wilson Fund

Assess internal operations with focus on efficiency and accountability; work with staff to implement new mandates

Community Foundation for Southeast Michigan

Research best practices for new grant program and recommend new program design

“Neithercut Philanthropy Advisors has conducted a number of projects for me over the past five years and I have always found the firm to be highly professional and very effective. Their advice and counsel was particularly valuable during my first years as the president of a family foundation.”

– Steve Wilson, President of Frey Foundation

DETROIT

313-568-9000

300 River Place
Suite 5000
Detroit, MI 48207

CHICAGO

312-316-9511

The John Hancock Center
875 North Michigan Avenue
Suite 3100
Chicago, IL 60611

▶ neithercutphilanthropy.com

