

SNAPSHOT OF TODAY'S

Philanthropic Landscape





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Snapshot of Today's Philanthropic Landscape



Robert Kissane
CCS President

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This is the third edition of CCS's *Snapshot of Today's Philanthropic Landscape*. This report is intended to serve as an overview of recent philanthropic activity in the United States.

In this report, we aggregate philanthropic information about giving trends, donor activity, and America's leading philanthropic institutions.

Each year, there are more and more philanthropic surveys and reports and this document is designed to capture the highlights from many of the most established and respected publications. We have made an attempt to synthesize what we consider some of the most useful illustrative information available.

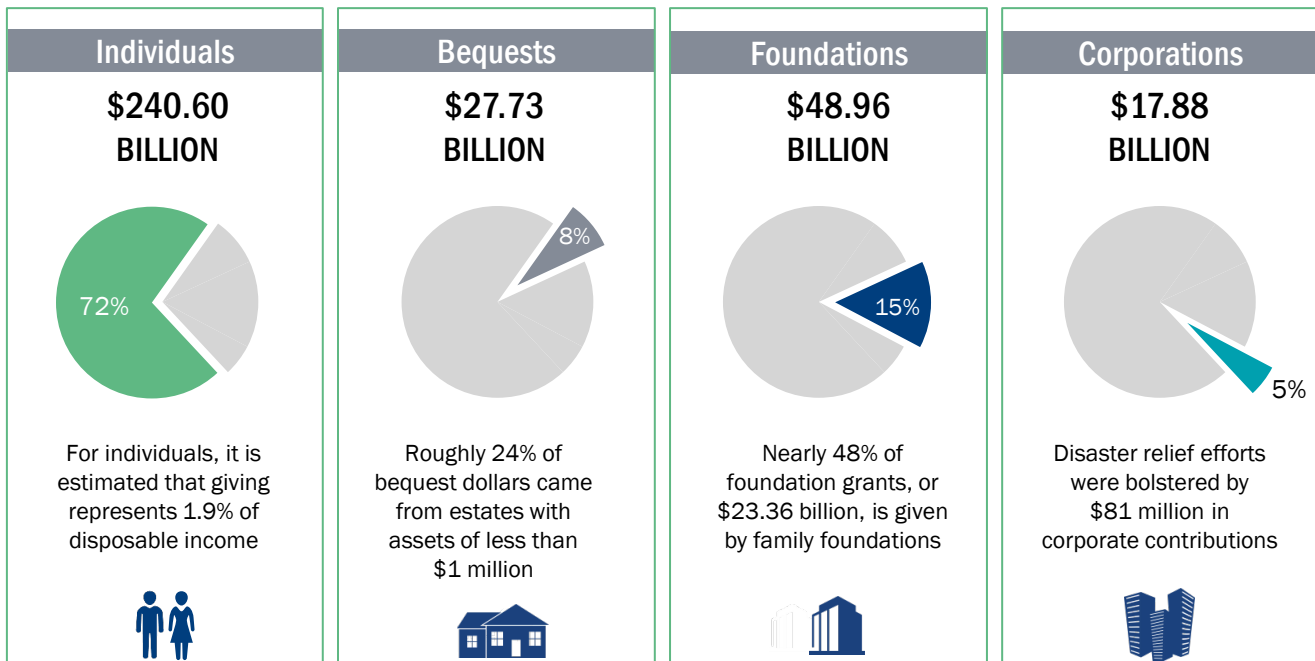
CCS has had the privilege of working with many of the leading American and international philanthropists and many of the leading non-profit organizations in the United States. We know firsthand how valuable this information is in setting strategies for philanthropic growth.

We hope that this brief snapshot will help guide you and your colleagues in developing the most effective strategies to provide the funding necessary to advance your philanthropic goals.

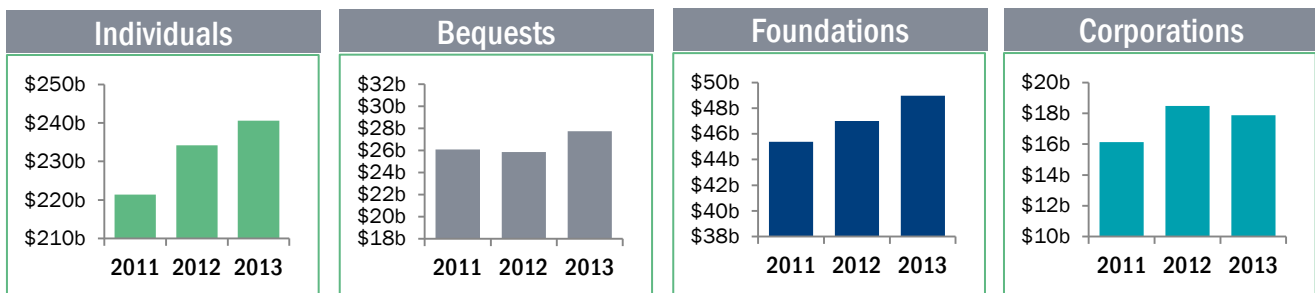
We encourage you to respond with your feedback and suggestions on how to improve this report. Please let us know what you think.

Sincerely,
Robert Kissane
March 2015

Where The \$335.17 Billion Came From In 2013



Where The Money Came From Over the Last 3 Years



Insights

- Individual giving accounts for an estimated 87% of all giving, inclusive of bequests and family foundation giving.
- Giving by individuals has returned nearly to pre-Economic Crisis levels, attributed to much larger gifts and bequests.
- Historically, corporate giving increases, though not proportionally, as company profits rise. Corporate profits have increased more slowly in recent years, which is reflected in the slight decrease in corporate giving.

Where Does The \$335.17 Billion Go?

Religious Organizations Receive The Largest Share Of Charitable Dollars



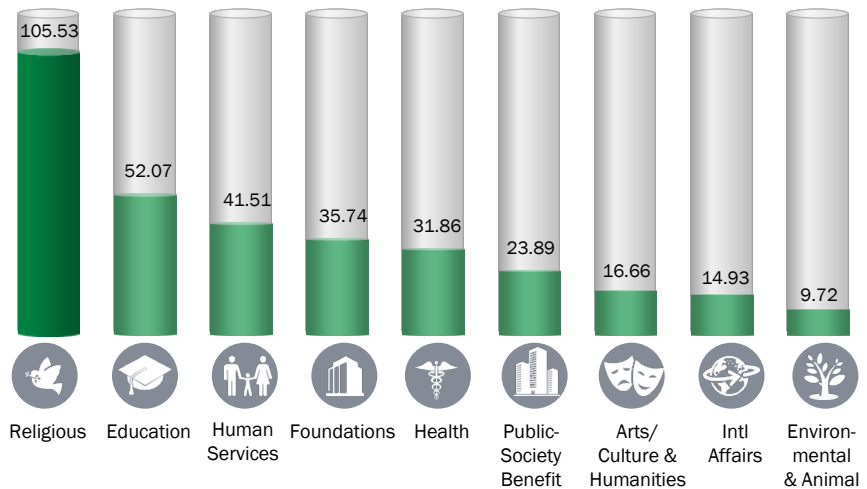
31%

was received by religious organizations in 2013.



Religious giving, as a percent of all giving, has declined since 1984. In 2013, the total dollar amount attributed to this sector decreased slightly. These trends reflect a decline in both worship attendance and the number of individuals with religious affiliations.

(\$ in Billions)

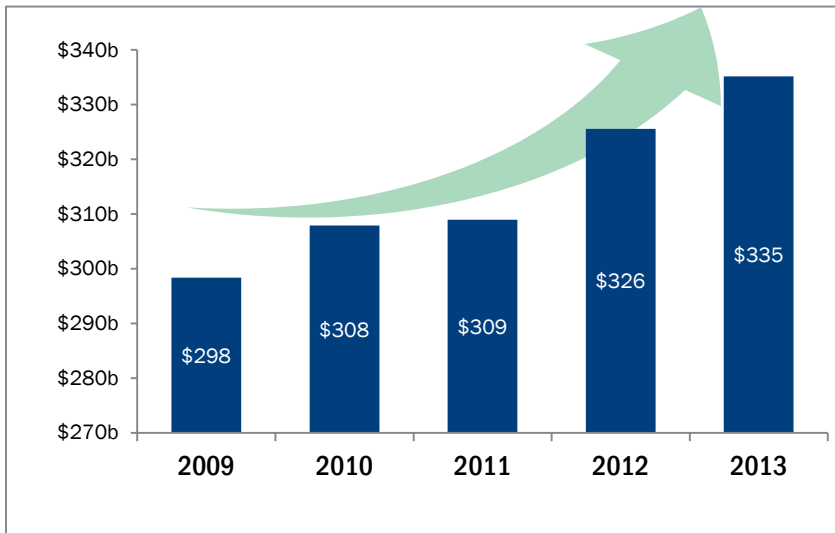


Insights

- Rapid growth in giving to the education sector can be linked to an increase in the number of capital campaigns.
- The human services sector saw counter-cyclical growth rallied by the demand for support during the recession. A shift to pre-recession giving preferences by donors has resulted in slower growth for this sector.
- Consistent support of the health sector mirrors donors' commitment to researching cures, supporting facilities, and funding innovative new research.
- Arts organizations were forced to refocus their fundraising efforts during the recession, as wealthy donors shifted their support away from the arts. The increase in giving to the arts in recent years may be the result of these donors returning to their pre-recession giving behavior.

Total Giving In The U.S. Has Increased By \$36.8 Billion In The Last Five Years (Inflation Adjusted)

Since 2009, the rate of change in total giving was 12.3%, adjusted for inflation.

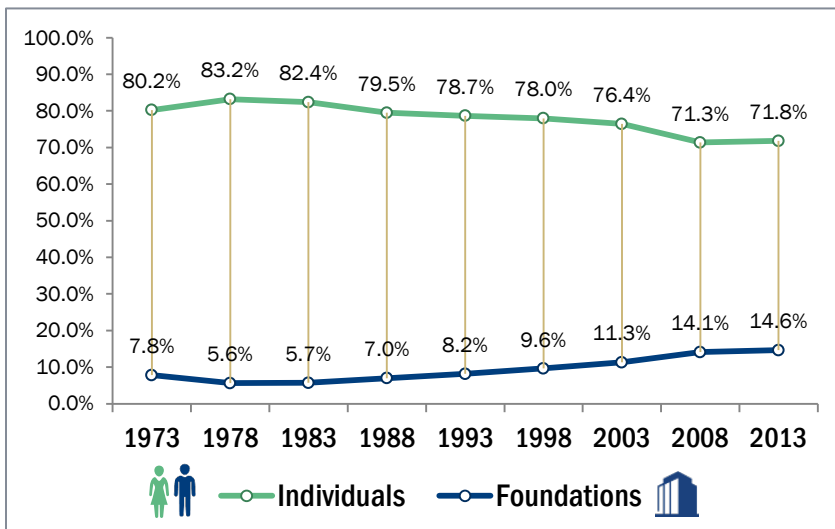


What this means...

If charitable giving continues to grow at the current rate, giving will return to the pre-recession high of \$349.50 billion (adjusted for inflation) in just one more year.

The proportions of giving from corporations and bequests have remained relatively steady since 1973.

The percentage of giving that comes from foundations has steadily increased, while the percentage of giving from individuals has declined.



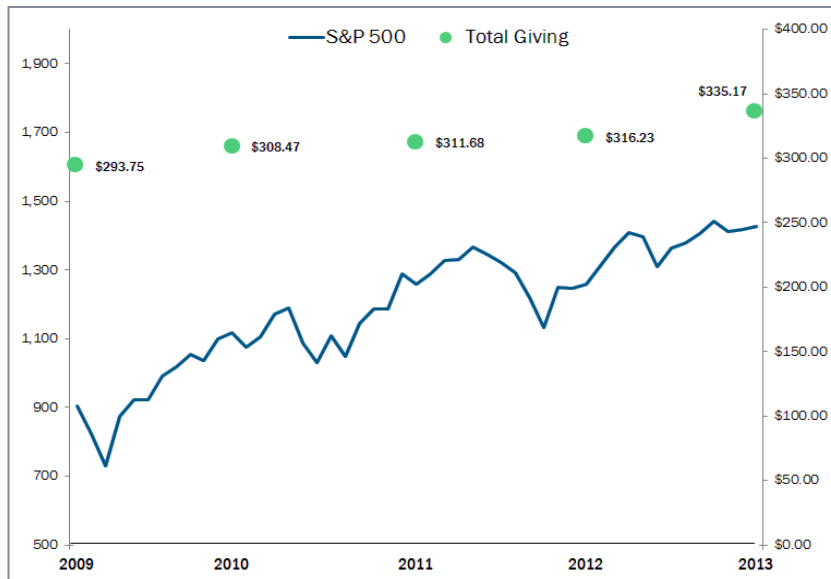
What this means...

The decline in the percentage of individual giving and increase in the percentage of foundation giving likely can be attributed to individuals shifting their philanthropic giving to their family foundations.

Overall Giving Correlates To Stock Market Performance

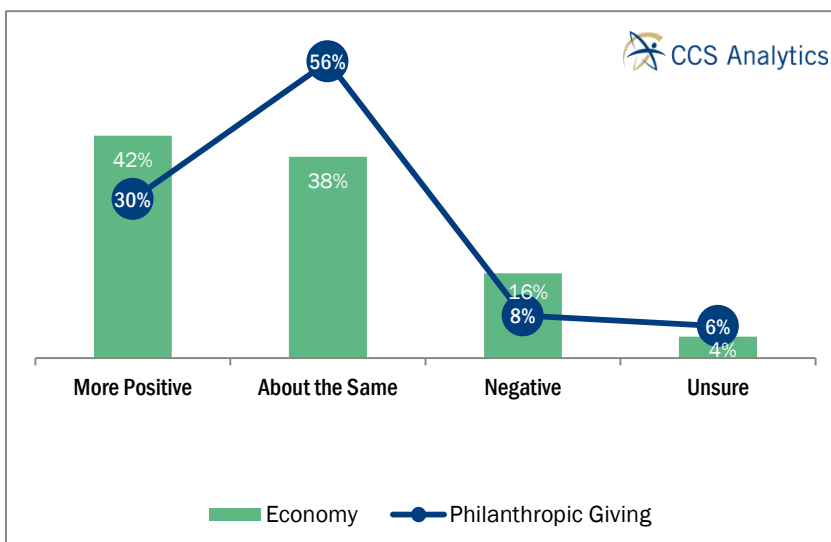
Over The Last Year, The Stock Market Has Seen A Nearly 30% Increase

Since 2009, the S&P 500 has doubled, and overall giving has also increased, though at a much slower rate.



Outlook on Economy Impacts Philanthropic Giving Positively²

Analysis of Interview Results of 2,000+ Non-profit Stakeholders From June 2013 to May 2014



Uptick in the Economy Impacting Philanthropic Giving

- ▶ The S&P 500 can be used as a strong indicator of charitable giving. When the Market is doing well, households and corporations are more likely to give. Other factors include income, the unemployment rate, consumer confidence, and corporate earnings.
- ▶ 42% of non-profit stakeholders feel more positively about the economy this year compared to last, a 3% increase from last year.¹
- ▶ 86% of non-profit stakeholders said they would give more or about the same to charity this year compared to last, a 5% increase from last year.¹



Individual Giving

Individuals Donated \$240.60 Billion In 2013

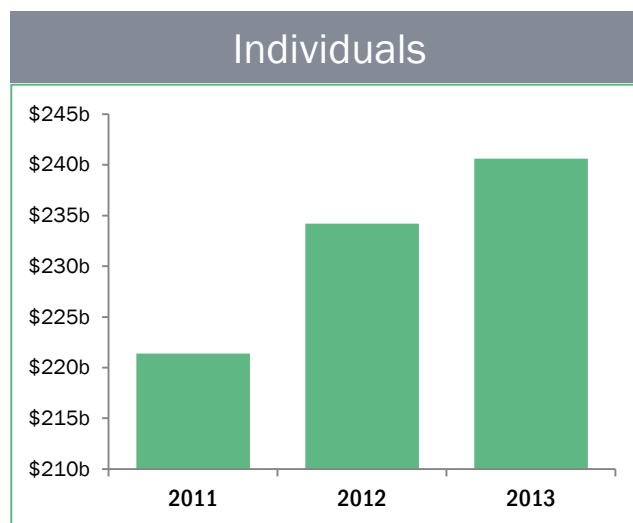


**\$240.60
BILLION**

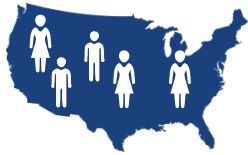
is estimated for individuals from charitable giving in 2013.

Top Reasons Why People Give...

- 1 People are inherently generous
- 2 People give to people
- 3 People respond to a meaningful mission
- 4 People give to the person who asks
- 5 People respond to specific requests for support
- 6 People respond to successful and beneficial programs
- 7 People give in a campaign atmosphere – annual or capital
- 8 Most people want, and all deserve, recognition for their gifts
- 9 People relate a gift to a specific need or project
- 10 People give to positive, enthusiastic solicitors
- 11 People give most often to their peers
- 12 People give because they are asked



Why Do People Give?



83%

of Americans have donated money to a charitable cause or organization in the last year.¹ Much of this went to local charities.

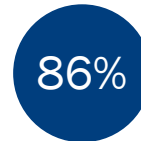


65%

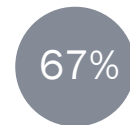
of surveyed donors have volunteered.¹



of households earning more than \$75,000



of middle income households



of households earning less than \$30,000

...have donated money to a charitable cause or organization in the last year.

Donors Give Based On The Impact Of Their Gifts²

Analysis of Interview Results of 32,000+ Non-Profit Stakeholders Since 2011



95% Of Wealthy Households Give To Charity

High Net Worth Households Gave On Average 7.8% Of Their Incomes To Charity In 2013¹



MILLIONAIRES

or high net worth individuals are those with liquid assets of

\$1 MILLION+

60-75%

of all U.S. philanthropy comes from high net worth individuals who represent just 3% of the total population¹

98.4%

of high net worth households gave to charity in 2013²

95.2%

percent gave to secular causes and 66.7% of high net worth gave to religious causes

65.4%

of high net worth households donate to charity. A much higher percentage than general population households

78.8%

of wealthy households (fewer) plan to give using cash in 2014-2016 (78.8%) compared to the proportion that used cash to donate in 2010-2013 (87.8%)

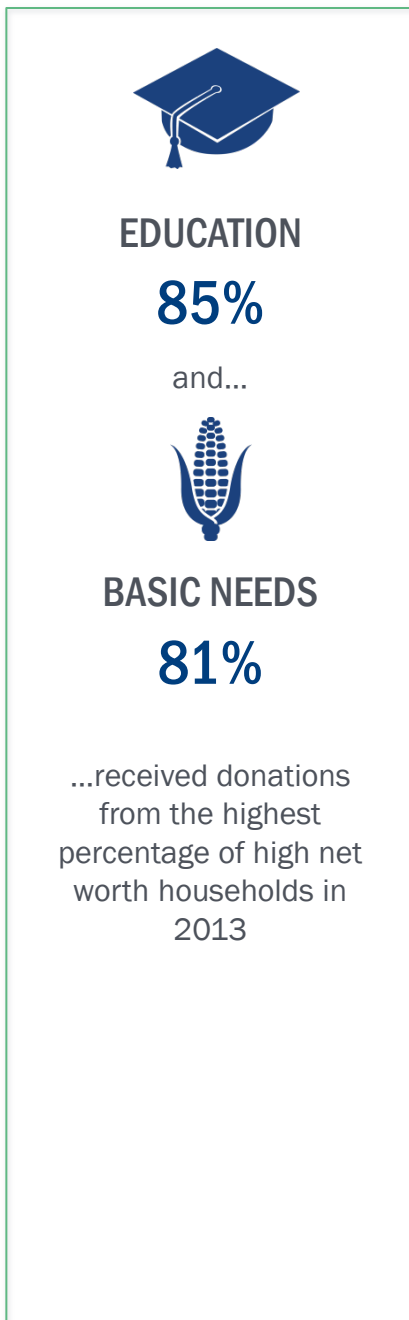
4 million



high net worth individuals in the U.S. in 2013 had estimated wealth totaling \$13.9 trillion³

Source: ¹New York Times, The Rich Are Different From You and Me. They Give More; ²Bank of America 2014 Study of High Net Worth Philanthropy; ³Capgemini, World Wealth Report 2014

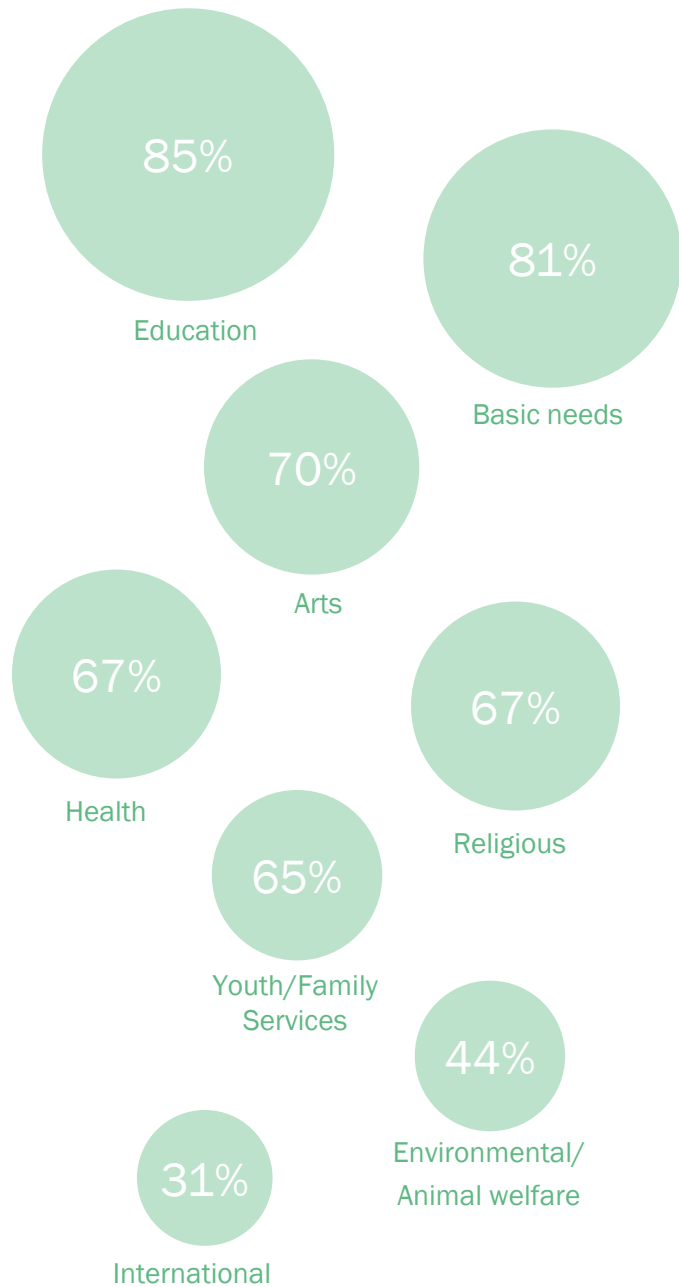
Where Do Donations From The Wealthy Go?

Education And Basic Needs Were Top Giving Categories In 2013




EDUCATION
85%
and...

BASIC NEEDS
81%

...received donations from the highest percentage of high net worth households in 2013



The Top 50 Philanthropists In 2013

Who They Are And How They Give

\$7.7 Billion TOTAL GIVING

- The Chronicle's ranking of the 50 donors who give the most to charitable causes shows that the wealthy contributed \$7.7 billion last year. That's 4% more than in 2012.
- Colleges, foundations, and hospitals received the most gifts worth \$1 million or more in 2013, followed by medical research facilities, arts organizations, and human-service groups. Causes for children and youths, the environment, religion, and public broadcasting took in the fewest gifts and the least money from the biggest donors.
- The median age of donors was 72.5.

PHILANTHROPY
50

Stats on the 50 Largest 2013 Donors

15 made their money in finance, more than any other line of work

12 made their money in real estate

31 have appeared on the list more than once

2 couples have appeared on the list for over 10 straight years

15 of the donors live in California

23 of the gifts by these top donors went to colleges and universities

3 inherited their wealth

9 left bequests

20 made their first appearance on the list



Where The Philanthropy 50 Gave

Philanthropy 50 Primary Causes		
Cause	Amount of Gifts	# of Gifts
Arts groups	\$121,700,000	1
Arts, education, environment, public health and other causes	\$452,000,000	4
Colleges and universities	\$2,845,510,000	25
Community foundations	\$1,062,000,000	2
Foundations	\$2,230,600,000	17
Hospitals and medical centers	\$333,600,000	6
Human-services groups	\$407,000,000	3
Jewish foundations	\$72,000,000	2
Religious groups	\$37,500,000	1
Science groups	\$117,000,000	2
Grand Total	\$7,678,910,000	63

Recent Donations By The Philanthropy 50

\$250 Million

Charles B. Johnson
Yale University

\$150 Million

Carl C. Icahn
Mount Sinai School of Medicine

\$100 Million

John and Jenny Paulson
Central Park Conservancy

\$100 Million

Paul Allen
#TackleEbola

\$100 Million

Stephen Schwarzman
Schwarzman Scholars

Who Are America's Top Donors?

America's Largest Givers: 50 Most Generous Donors of 2013

Rank	Donor	Wealth Source(s)	Primary Cause(s)	Residence	Amount Given
1	Mark Zuckerberg and Priscilla Chan	Technology	Community foundations	Palo Alto, CA	\$992,200,000
2	George Mitchell†*	Energy, oil, real estate	Foundations	Galveston, TX	\$750,000,000*
3	Philip and Penelope Knight	Manufacturing	Colleges and universities	Portland, OR	\$500,000,000
4	Michael Bloomberg	Media and entertainment	Arts, education, environment, public health	New York, NY	\$452,000,000
5	John and Laura Arnold	Finance	Foundations	Houston, TX	\$296,200,000
6	Charles Johnson	Finance	Colleges and universities	San Mateo, CA	\$250,000,000
7	Pierre and Pam Omidyar	Technology	Human services groups	Honolulu, HI	\$225,000,000
8	Irwin and Joan Jacobs	Telecommunications	Colleges and universities	La Jolla, CA	\$221,100,000
9	Sergey Brin and Anne Wojcicki	Technology	Foundations	Mountain View, CA	\$219,000,000
10	Jeffrey Carlton†*	Industry	Foundations	Long Beach, CA	\$212,000,000*
11	Paul Allen	Technology	Foundations	Seattle, WA	\$206,000,000
12	Stephen Ross	Real estate	Colleges and universities	New York, NY	\$200,000,000
13	Ronald Perelman	Finance, investments	Colleges and universities	New York, NY	\$196,000,000
14	Muriel Block†*	Real estate	Colleges and universities	New York, NY	\$160,000,000*
15	Eli and Edythe Broad	Finance, real estate	Foundations	Los Angeles, CA	\$157,000,000
16	John Arrillaga	Real estate	Colleges and universities	Palo Alto, CA	\$151,000,000
17	Charles Munger	Investments	Colleges and universities	Los Angeles, CA	\$150,400,000

Disclaimer: The 14th annual Philanthropy 50, The Chronicle's list of America's most generous donors, is based on gifts and pledges of cash and stock to nonprofit organizations. Although The Chronicle sought to find all information about large donations made by individuals in 2013, not all philanthropists publicly disclose details about their giving, and they are not legally required to do so. Gifts that donors made from their family foundations were not counted, to avoid including them twice: when the donor gave the money to the foundation and when he or she chose a beneficiary for the money. The Chronicle counted only those donations that philanthropists made to organizations with charity or foundation status under section 501(c)3 of the Internal Revenue Service Code. The list does not include payments that donors made on pledges announced in previous years, to avoid counting the same gifts twice.

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America's Largest Givers: 50 Most Generous Donors of 2013

Rank	Donor	Wealth Source(s)	Primary Cause(s)	Residence	Amount Given
18	Theodore (Ted) and Vada Stanley‡	Marketing	Foundations	New Canan, CT	\$143,500,000
19	Jack MacDonald†*	Family wealth, investments	Human services groups	Seattle, WA	\$139,000,000*
20	T. Denny Sanford	Finance	Colleges and universities	Sioux Falls, SD	\$130,500,000
21	David Rubenstein	Finance	Arts groups	Washington, DC	\$121,700,000
22	Sanford and Joan Weill	Finance	Colleges and universities	New York, NY	\$118,100,000
23	Stephen Schwarzman	Investments	Colleges and universities	New York, NY	\$103,000,000
24	David Koch	Oil	Hospitals and medical centers	New York, NY	\$101,000,000
25	Frank McCourt	Finance, real estate	Colleges and universities	Boston, MA	\$100,000,000
26	Lawrence Ellison	Technology	Foundations	Redwood Shores, CA	\$72,200,000
27	John Boruchin†*	Real estate	Jewish federations	Fontana, CA	\$72,000,000*
28	Richard and Nancy Kinder	Energy	Foundations	Houston, TX	\$70,100,000
29	Alfred Mann	Health care	Community foundations	Las Vegas, NV	\$70,000,000
30	Robert and Patricia Kern	Manufacturing	Hospitals and medical centers	Waukesha, WI	\$67,300,000
31	Stephen and Nancy Grand	Real estate	Science groups	San Francisco, CA	\$67,000,000
32	J. Harold Harrison†*	Health care, investments	Colleges and universities	Bartow, GA	\$66,000,000*
33	Bruce and Suzie Kovner	Finance, investments	Colleges and universities	New York, NY	\$65,000,000
34	Julian Robertson, Jr.	Finance	Foundations	New York, NY	\$64,300,000

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Who Are America's Top Donors?

America's Largest Givers: 50 Most Generous Donors of 2013

Rank	Donor	Wealth Source(s)	Primary Cause(s)	Residence	Amount Given
35	Lyda Hill	Family wealth, investments	Hospitals and medical centers	Dallas, TX	\$63,200,000
36	James Clark	Technology	Colleges and universities	Mountain View, CA	\$60,000,000
37	Dale and Sarah Ann Fowler	Real estate	Colleges and universities	Anaheim, CA	\$55,100,000
38	Richard and Melanie Lundquist	Real estate	Hospitals and medical centers	Los Angeles, CA	\$52,100,000
39	Richard and Susan Rogel	Health care, investments	Colleges and universities	Avon, CO	\$50,100,000
40	Arthur and Rebecca Samberg	Finance, investments	Colleges and universities	New York, NY	\$50,100,000
41	Abraham Mitchell	Real estate	Colleges and universities	Mobile, AL	\$50,100,000
42	Robert and Anne Bass	Finance	Colleges and universities	Fort Worth, TX	\$50,000,000
43	Buerger Family	Insurance	Hospitals and medical centers	Philadelphia, PA	\$50,000,000
44	David Murdock	Food and beverage, real estate	Science groups	Los Angeles, CA	\$50,000,000
45	Richard Herman†*	Family wealth	Human services groups	Washington, DC	\$43,000,000*
46	Raymond and Kathryn Harbert	Finance	Colleges and universities	Birmingham, AL	\$40,100,000
47	Donald Marron	Finance	Colleges and universities	New York, NY	\$40,000,000
48	George Soros	Finance	Foundations	New York, NY	\$40,000,000
49	William Ridgway†*	Health care, investments	Colleges and universities	Evansville, IN	\$39,000,000*
50	Millicent Atkins†*	Agriculture	Religious groups	Ipswich, SD	\$37,500,000*

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Recent Inspiring Transformational Gifts

Ted Stanley
\$650,000,000
Broad Institute
Harvard University

Gerald Chan and Ronnie Chan
\$350,000,000
Harvard
University

Michael R. Bloomberg
\$350,000,000
Johns Hopkins University

Kenneth Griffin
\$150,000,000
Harvard
University

Kresge Foundation
\$150,000,000
Detroit Future City

Diller-von Furstenberg
Foundation (Barry Diller)
\$130,000,000
Hudson River Park
Trust (New York)

Lynne and Marc Benioff
\$125,000,000
UCSF Benioff Children's
Hospital

Ernest Rady
\$120,000,000
Rady Children's
Hospital

David H. Koch
\$100,000,000
New York-Presbyterian
Hospital

Marie-Josée and Henry R. Kravis
\$100,000,000
Memorial Sloan Kettering
Cancer Center

Sandra and Edward
Meyer Foundation
\$75,000,000
Weill Medical College
of Cornell University

Gordon and Betty Irene
Moore
\$50,000,000
University of California
San Francisco

Laura and Isaac Perlmutter
\$50,000,000
NYU Langone
Medical Center

David M. Rubenstein
\$50,000,000
Kennedy
Center

Oprah Winfrey
\$12,000,000
National Museum of African
American History and Culture

What Is The Giving Pledge?

Many Of America's Top Donors Have Already Signed The Giving Pledge

THE GIVING PLEDGE



is an effort made public in June 2010 by the two wealthiest men in the United States, billionaires Warren Buffett and Bill Gates. The pledge addresses society's most pressing problems by inviting the wealthiest American families and individuals to commit to giving more than one-half of their wealth to philanthropy or charitable causes.

108 U.S.

There are 108 U.S. pledgers

19 International

There are 19 international pledgers

\$600 billion combined

With an estimated net worth of more than \$600 billion, the 127 Giving Pledge participants represent a potentially game-changing force in philanthropy

69 years of age

The median age of participants is 69 years (David Rockefeller at 98 is the oldest, while Cari Tuna is the youngest at 28)

Breakdown Of Giving Pledge Participants

Interests

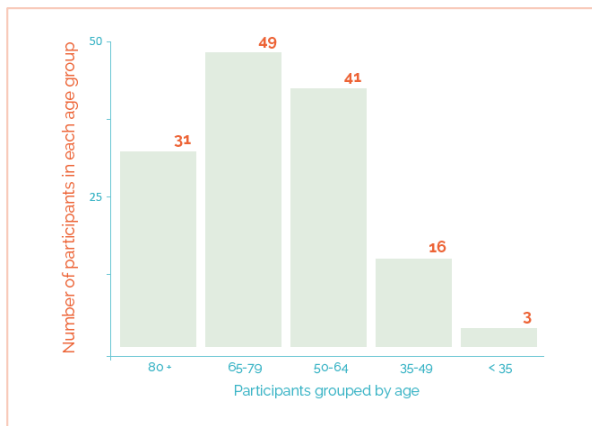
INTERESTS

of pledge mainly in health, human services, education, and arts & culture.



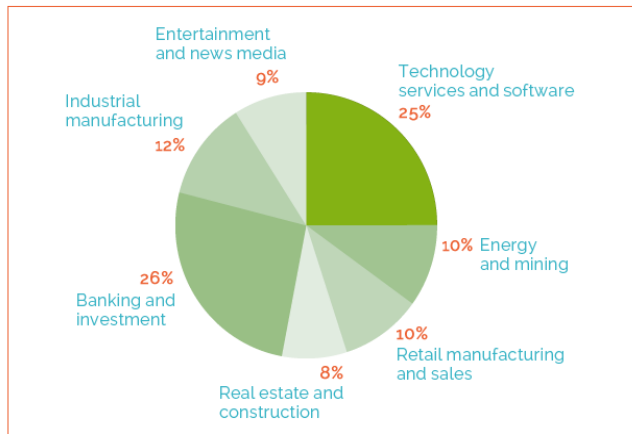
Age Distribution

The age distribution of the Giving Pledge participants strongly favors those born before World War II.



Industry Focus

Pledge participants show strong presence of HNW individuals from financial and high-tech industries.



Who Signed The Giving Pledge?

Giving Pledge Now Includes 127 Participants

Bill and Karen Ackman	Paul G. Allen	Laura and John Arnold	Lord Ashcroft KCMG PC	Nicolas Berggruen	Manoj Bhargava	Steve Bing
Sara Blakely	Arthur M. Blank	Michael R. Bloomberg	Richard and Joan Branson	Eli and Edythe Broad	Charles R. Bronfman	
Warren Buffett	Jean and Steve Case	John Caudwell	Lee and Toby Cooperman	Joe Craft	Joyce and Bill Cummings	Ray and Barbara Dalio
John Paul DeJoria	Barry Diller and Diane von Furstenberg	Ann and John Doerr	Glenn and Eva Dubin	Larry Ellison	Charles F. Feeney	Andrew and Nicola Forrest
	Phillip and Patricia Frost	Bill and Melinda Gates	Monica and David Gelbaum	Dan and Jennifer Gilbert	Ann Gloag OBE	Dave Goldberg and Cheryl Sandberg
David and Barbara Green	Jeff and Mei Sze Greene	Harold and Sue Ann Hamm	Reed Hastings and Patty Quillin	Lyda Hill	Barron Hilton	Chris Hohn
Jon and Karen Huntsman	Dr. Mo Ibrahim	Carl Icahn	Joan and Irwin Jacobs	George B. Kaiser	Vinod and Neeru Khosla	Sidney Kimmel
Rich and Nancy Kinder	Beth and Seth Klarman	Elaine and Ken Langone	Liz and Eric Lefkofsky	Gerry and Marguerite Lenfest	Peter B. Lewis (d. 2013)	Lorry I. Lokey
George Lucas and Melody Hobson	Duncan and Nancy MacMillan	Alfred E. Mann	Joe and Rika Mansueto	Bernie and Billi Marcus	Richard Edwin and Nancy Peery Marriott	Strive and Tsitsi Masiyiwa

Who Signed The Giving Pledge?

Giving Pledge Now Includes 127 Participants

Craig and Susan McCaw	Red and Charline McCombs	Michael and Lori Milken	Yuri Milner		Thomas S. Monaghan	Gordon and Betty Moore
Tashia and John Morgridge	Michael Moritz and Harriet Heyman	Dustin Moskowitz and Cari Tuna	Patrice and Precious Motsepe	Elon Musk	Arif Naqvi	Jonathan M. Nelson
Pierre and Pam Omidyar	Natalie and Paul Orfalea	Bernard and Barbro Osher	Bob and Renee Parsons	Ronald O. Perelman	Jorge M. and Darlene Perez	Peter G. Peterson
T. Boone Pickens	Victor Pinchuk	Hasso Plattner	Vladimir Potanin	Azim Premji	Julian H. Robertson, Jr.	David Rockefeller
Edward W. and Deedie Potter Rose	Stephen M. Ross	David M. Rubenstein	David Sainsbury	John and Ginger Sall	Henry and Susan Samueli	Herb Sandler
Denny Sanford	Vicki and Roger Sant	Lynn Schusterman	Walter Scott, Jr.	Tom and Cindy Secunda	Craig Silverstein and Mary Obelnicki	Annette Simmons
Jim and Marilyn Simons	Paul E. Singer	Jeff Skoll	John A. and Susan Sobrato, John Michael Sobrato	Michele and Patrick Soon-Shiong	Ted Stanley	Mark and Mary Stevens
Tom Steyer and Kat Taylor	Virginia Stowers	Dato' Sri DR Tahir	Vincent Tan Chee Yioun	Tad Taube	Leonard Tow	Ted Turner
	Dr. Romesh and Kathleen Wadhvani	Sanford and Joan Weill	Shelby White	Hansjörg Wyss	Samuel Yin	Charles Zegar and Meryll Snow Zegar
Mark Zuckerberg						



Foundation Giving

Foundations Granted \$48.96 Billion In 2013



**\$48.96
BILLION**

Nearly 48% of foundation grants, or \$23.36 billion, is given by family foundations.



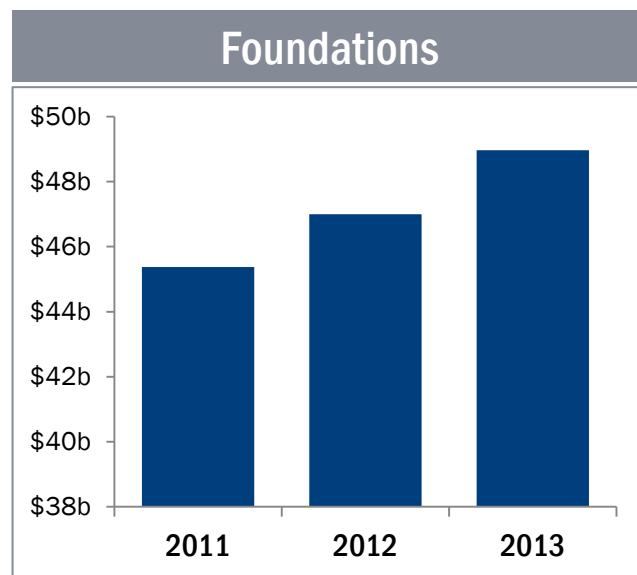
**GRANTMAKING BY
COMMUNITY
FOUNDATIONS ...**
rose 7.9% between
2011 and 2013.¹



New York State
ranks first in the nation
based on number of
foundations (9,880)
and overall giving (\$8.7 B).²



Inflation-adjusted-dollar grantmaking by independent, community, and operating foundations increased by 4.2% between 2012 and 2013¹.



Source: ¹Giving USA Foundation (Giving USA, 2014)
²The Foundation Center, Key Facts on US Foundations
2014

America's Top Foundations

Top 50 U.S. Foundations by Total Giving

#	Name/(state)	Total Giving	As of Fiscal Year End Date
1	Bill & Melinda Gates Foundation (WA)	\$3,178,235,962	12/31/2012
2	The Abbvie Patient Assistance Foundation(IL)	783,366,952	12/31/2013
3	Lilly Cares Foundation, Inc. (IN)	697,004,928	12/31/2013
4	Merck Patient Assistance Program, Inc. (NJ)	686,800,564	12/31/2013
5	Genentech Access To Care Foundation (CA)	680,278,040	12/31/2013
6	Johnson & Johnson Patient Assistance Foundation, Inc. (NJ)	611,680,261	12/31/2012
7	GlaxoSmithKline Patient Access Programs Foundation (PA)	599,953,667	12/31/2012
8	Ford Foundation (NY)	593,753,416	12/31/2012
9	The Bristol-Myers Squibb Patient Assistance Foundation, Inc. (NY)	548,857,548	12/31/2012
10	Pfizer Patient Assistance Foundation, Inc. (NY)	515,726,553	12/31/2012
11	Open Society Institute(NY)	455,863,798	12/31/2012
12	Novartis Patient Assistance Foundation, Inc. (NJ)	452,745,445	12/31/2012
13	Walton Family Foundation, Inc. (AR)	423,776,585	12/31/2012
14	The Estee Lauder Fund (IL)	396,802,000	12/31/2012
15	The Susan Thompson Buffett Foundation (NE)	367,167,893	12/31/2012
16	Silicon Valley Community Foundation(CA)	362,390,000	12/31/2013
17	The Robert Wood Johnson Foundation (NJ)	292,906,381	12/31/2012
18	Sanofi Foundation for North America (NJ)	284,044,399	12/31/2012
19	Gordon and Betty Moore Foundation (CA)	272,332,512	12/31/2013
20	Lilly Endowment Inc.(IN)	270,300,000	12/31/2013
21	W. K. Kellogg Foundation (MI)	259,898,647	8/31/2013
22	Foundation to Promote Open Society (NY)	257,940,437	12/31/2012
23	The David and Lucile Packard Foundation (CA)	256,130,462	12/31/2012
24	International Medical Outreach, Inc. (TX)	247,416,601	12/31/2012
25	The William and Flora Hewlett Foundation (CA)	240,100,000	12/31/2013

America's Top Foundations

Top 50 U.S. Foundations by Total Giving

#	Name/(state)	Total Giving	As of Fiscal Year End Date
26	The Andrew W. Mellon Foundation (NY)	234,372,144	12/31/2013
27	Greater Kansas City Community Foundation(MO)	234,274,371	12/31/2013
28	The Leona M. and Harry B. Helmsley Charitable Trust (NY)	210,352,475	3/31/2013
29	The John D. and Catherine T. MacArthur Foundation (IL)	209,859,152	12/31/2012
30	Wells Fargo Foundation(CA)	186,775,875	12/31/2013
31	The Wal-Mart Foundation, Inc. (AR)	182,859,236	1/31/2013
32	Boehringer Ingelheim Cares Foundation, Inc.(CT)	179,977,010	12/31/2013
33	The Simons Foundation(NY)	179,640,382	12/31/2013
34	The Bank of America Charitable Foundation, Inc. (NC)	175,299,789	12/31/2012
35	The Chicago Community Trust (IL)	169,744,869	9/30/2012
36	California Community Foundation (CA)	164,428,000	6/30/2013
37	Foundation For The Carolinas (NC)	157,713,177	12/31/2012
38	Robert W. Woodruff Foundation, Inc. (GA)	155,816,887	12/31/2013
39	Eli & Edythe Broad Foundation (CA)	153,400,126	12/31/2012
40	The New York Community Trust (NY)	144,241,100	12/31/2013
41	The Kresge Foundation(MI)	141,959,580	12/31/2012
42	Jerome L. Greene Foundation, Inc. (NY)	137,247,200	12/31/2012
43	Camp Foundation (CA)	135,600,000	6/30/2013
44	The Rockefeller Foundation (NY)	135,082,747	12/31/2012
45	Bloomberg Philanthropies (NY)	131,263,386	12/31/2012
46	GE Foundation (CT)	130,695,809	12/31/2012
47	The Duke Endowment(NC)	127,729,045	12/31/2013
48	The Dolese Foundation (OK)	118,056,788	3/31/2013
49	The California Endowment (CA)	115,768,774	3/31/2013
50	The JPMorgan Chase Foundation (NY)	115,516,001	12/31/2012

America's Top Foundations

Top 50 U.S. Foundations By Assets

Rank	Name/(State)	Assets	As of
1	Bill & Melinda Gates Foundation (WA)	\$37,176,776,438	12/31/2012
2	Ford Foundation (NY)	11,238,035,011	12/31/2012
3	J. Paul Getty Trust (CA)	10,502,514,302	6/30/2012
4	The Robert Wood Johnson Foundation (NJ)	9,528,568,196	12/31/2012
5	The William and Flora Hewlett Foundation (CA)	8,607,073,000	12/31/2013
6	W. K. Kellogg Foundation (MI)	8,155,292,105	8/31/2013
7	Lilly Endowment Inc. (IN)	7,699,211,116	12/31/2013
8	The David and Lucile Packard Foundation (CA)	6,299,952,716	12/31/2012
9	The John D. and Catherine T. MacArthur Foundation (IL)	5,987,438,524	12/31/2012
10	Gordon and Betty Moore Foundation (CA)	5,697,258,026	12/31/2012
11	The Andrew W. Mellon Foundation (NY)	5,556,152,571	12/31/2012
12	Silicon Valley Community Foundation (CA)	4,723,897,000	12/31/2013
13	Bloomberg Philanthropies (NY)	4,242,746,954	12/31/2012
14	The Leona M. and Harry B. Helmsley Charitable Trust (NY)	4,241,501,002	3/31/2013
15	Tulsa Community Foundation (OK)	3,729,789,000	12/31/2012
16	The Rockefeller Foundation (NY)	3,695,617,868	12/31/2012
17	The California Endowment (CA)	3,562,148,280	3/31/2013
18	The Duke Endowment (NC)	3,367,128,863	12/31/2013
19	The Kresge Foundation (MI)	3,301,625,267	12/31/2012
20	Robert W. Woodruff Foundation, Inc. (GA)	3,119,096,039	12/31/2013
21	Margaret A. Cargill Foundation (MN)	2,954,027,761	12/31/2012
22	Carnegie Corporation of New York (NY)	2,764,431,433	9/30/2012
23	Foundation to Promote Open Society (NY)	2,709,320,378	12/31/2012
24	The Annie E. Casey Foundation (MD)	2,666,068,266	12/31/2012
25	John Templeton Foundation (PA)	2,555,855,497	12/31/2012

America's Top Foundations

Top 50 U.S. Foundations By Assets

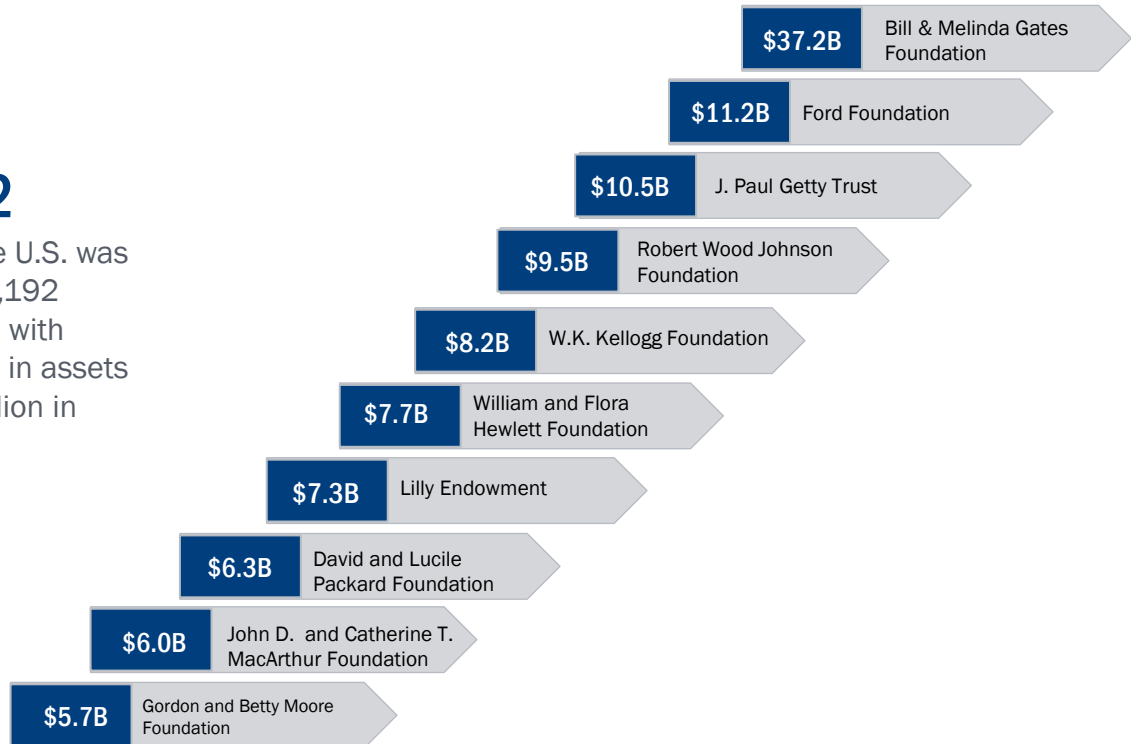
Rank	Name/(State)	Assets	As of
26	The New York Community Trust (NY)	2,443,372,250	12/31/2013
27	John S. and James L. Knight Foundation (FL)	2,395,608,862	12/31/2013
28	The Susan Thompson Buffett Foundation (NE)	2,384,070,265	12/31/2012
29	Charles Stewart Mott Foundation (MI)	2,304,865,937	12/31/2012
30	Kimbell Art Foundation (TX)	2,254,647,166	12/31/2012
31	Conrad N. Hilton Foundation (CA)	2,230,883,024	12/31/2012
32	Charles and Lynn Schusterman Family Foundation (OK)	2,208,464,518	12/31/2012
33	The Simons Foundation (NY)	2,083,631,666	12/31/2012
34	The McKnight Foundation (MN)	2,063,472,860	12/31/2012
35	Casey Family Programs (WA)	2,061,764,408	12/31/2012
36	Richard King Mellon Foundation (PA)	2,060,318,008	12/31/2012
37	The Harry and Jeanette Weinberg Foundation, Inc. (MD)	2,046,251,873	2/28/2013
38	The William Penn Foundation (PA)	2,019,462,152	12/31/2012
39	Walton Family Foundation, Inc. (AR)	1,999,066,369	12/31/2012
40	The Cleveland Foundation (OH)	1,883,022,162	12/31/2012
41	Ewing Marion Kauffman Foundation (MO)	1,880,334,000	12/31/2012
42	The Chicago Community Trust (IL)	1,804,362,755	9/30/2012
43	Alfred P. Sloan Foundation (NY)	1,734,238,378	12/31/2012
44	Doris Duke Charitable Foundation (NY)	1,726,653,990	12/31/2012
45	The Oregon Community Foundation (OR)	1,698,892,336	12/31/2013
46	The James Irvine Foundation (CA)	1,675,267,930	12/31/2012
47	Eli & Edythe Broad Foundation (CA)	1,658,457,965	12/31/2012
48	Greater Kansas City Community Foundation (MO)	1,636,468,707	12/31/2012
49	Annenberg Foundation (CA)	1,623,162,045	12/31/2012
50	The Wyss Foundation (DC)	1,558,634,475	12/31/2012

Foundation Giving

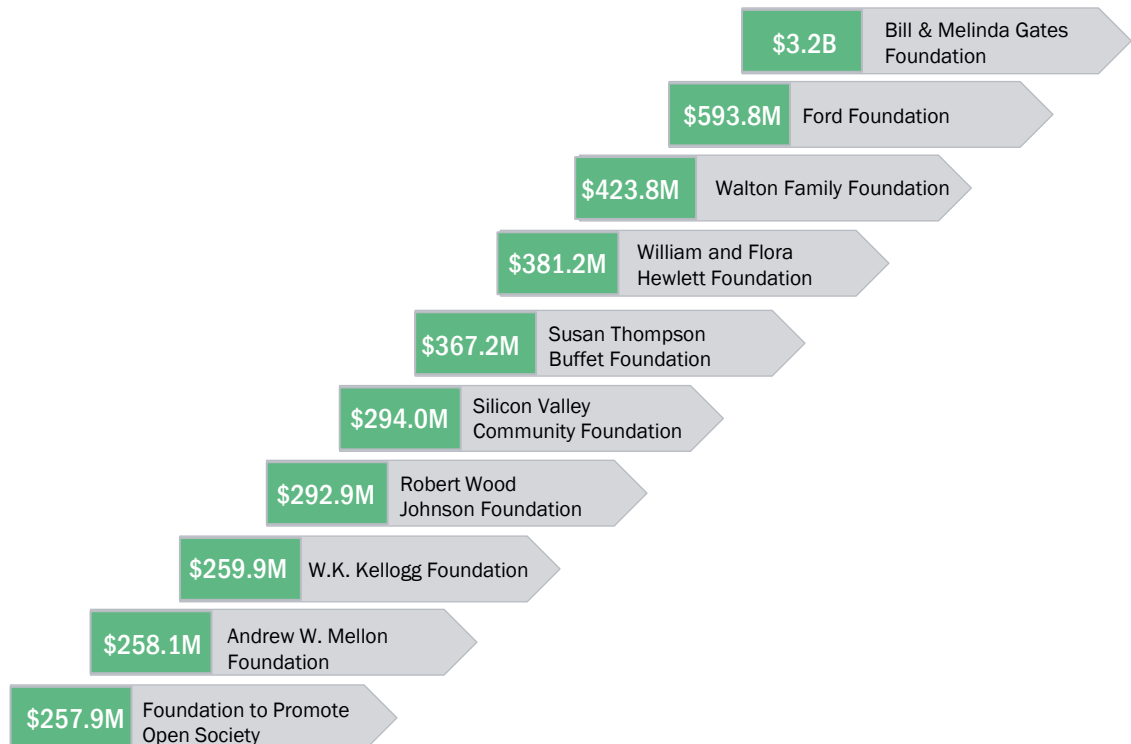
By Total Assets

86,192

In 2012, the U.S. was home to 86,192 foundations with \$715 billion in assets and \$52 billion in giving.



By Total Giving



Grant Giving

154,000

In 2012, a subset of the nation's largest foundations awarded nearly 154,000 grants totaling \$22.4 billion.



22%

Health

\$5B



22%

Education

\$5B



16%

Human Services

\$3.5B



12%

Public Affairs/Society Benefit

\$2.7B



10%

Arts and Culture

\$2.2B



7%

Environment and Animals

\$1.6B



5%

International Affairs

\$1.1B



3%

Science and Technology

\$606M



2%

Religion

\$468M



Social Sciences

\$243M



Corporate Giving

Corporations Gave \$17.88 Billion In 2013



**\$17.88
BILLION**

Disaster relief efforts were bolstered by \$81 million in corporate contributions.



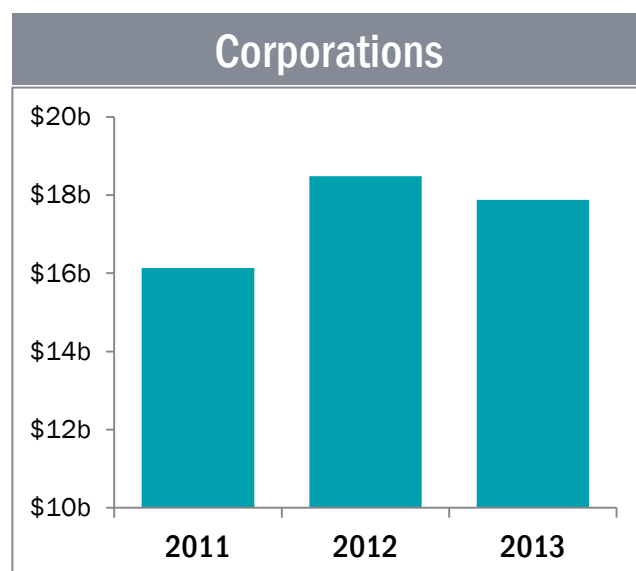
**CORPORATIONS
GAVE MOST OFTEN
TO:**

Health, Social
Services and
Education.

Corporate foundation
grantmaking grew
5% in 2013, to
\$5.73 billion



- Corporate pre-tax profits are a significant factor in how much corporations give each year, and changes in corporate giving closely follow corporate pre-tax profits.
- Giving by corporations declined 1.9% in 2013 from 2012 and totaled \$17.88 billion. Adjusted for inflation, giving by corporations declined 3.2% in 2013.
- Corporate giving includes cash and in-kind contributions made through corporate giving programs, as well as grants and gifts made by corporate foundations.
- The 2013 estimate for giving by corporations includes \$81 million in corporate contributions made to non-profit organizations in support of disaster relief efforts.



Key Facts On Corporate Foundations

The Foundation Center estimates that the nation's estimated 2,629 corporate foundations will give away approximately

\$5.5 BILLION



Up 6% from 2010

\$5.5 Billion

Estimated giving by corporate foundations in 2013

6.0%

Estimated increase in corporate foundation giving between 2011 and 2013

2,629

Number of grantmaking corporate foundations in 2013

11%

Corporate foundation giving as a share of all foundation giving in 2013

America's Top Corporate Foundations

Top 50 Corporate Grantmaking Foundations By Giving

Rank	Name/(state)	Total Giving	As of
1	Novartis Patient Assistance Foundation, Inc. (NJ)	\$452,745,445	12/31/2012
2	Sanofi Foundation for North America (NJ)	284,044,399	12/31/2012
3	Wells Fargo Foundation (CA)	186,775,875	12/31/2013
4	The Wal-Mart Foundation, Inc. (AR)	182,859,236	1/31/2013
5	The Bank of America Charitable Foundation, Inc. (NC)	175,299,789	12/31/2012
6	GE Foundation (CT)	130,695,809	12/31/2012
7	The JPMorgan Chase Foundation (NY)	115,516,001	12/31/2012
8	Citi Foundation (NY)	88,898,161	12/31/2012
9	ExxonMobil Foundation (TX)	72,747,966	12/31/2013
10	Abbott Fund (IL)	72,741,720	12/31/2012
11	The Coca-Cola Foundation, Inc. (GA)	69,658,157	12/31/2012
12	Caterpillar Foundation (IL)	59,031,292	12/31/2012
13	The PNC Foundation (PA)	48,269,009	12/31/2013
14	Johnson & Johnson Family of Companies Foundation (NJ)	46,445,669	12/31/2013
15	Intel Foundation (OR)	45,318,315	12/31/2012
16	Verizon Foundation (NJ)	43,374,615	12/31/2012
17	The Merck Company Foundation (NJ)	42,861,890	12/31/2012
18	MetLife Foundation (NY)	41,107,662	12/31/2012
19	The UPS Foundation (GA)	41,012,492	12/31/2012
20	Google Foundation (CA)	39,606,000	12/31/2012
21	The Goldman Sachs Foundation (NY)	36,658,124	12/31/2012
22	Bayer U.S. Patient Assistance Foundation (PA)	34,927,912	11/30/2013
23	The Bristol-Myers Squibb Foundation, Inc. (NY)	31,175,633	12/31/2012
24	Blue Shield of California Foundation (CA)	31,167,629	12/31/2012
25	Newman's Own Foundation (CT)	30,000,000	12/31/2012

America's Top Corporate Foundations

Top 50 Corporate Grantmaking Foundations By Giving

Rank	Name/(state)	Total Giving	As of
26	General Motors Foundation, Inc. (MI)	27,627,768	12/31/2012
27	Emerson Charitable Trust (MO)	27,575,141	9/30/2012
28	General Mills Foundation (MN)	26,898,325	5/31/2013
29	The Prudential Foundation (NJ)	26,859,858	12/31/2012
30	Eli Lilly and Company Foundation (IN)	26,398,760	12/31/2012
31	Duke Energy Foundation (NC)	26,051,888	12/31/2013
32	Nationwide Insurance Foundation (OH)	25,558,922	12/31/2012
33	The PepsiCo Foundation, Inc. (NY)	25,414,950	12/31/2012
34	The Medtronic Foundation (MN)	24,108,117	4/30/2013
35	U.S. Bancorp Foundation, Inc. (MN)	23,292,965	12/31/2012
36	Reckitt Benckiser Pharmaceuticals Patient Help Foundation (VA)	22,288,109	12/31/2012
37	The Dow Chemical Company Foundation (MI)	22,154,105	12/31/2012
38	Freddie Mac Foundation (VA)	22,132,385	12/31/2012
39	Ford Motor Company Fund (MI)	21,970,680	12/31/2012
40	Enterprise Holdings Foundation (MO)	21,854,614	7/31/2013
41	Monsanto Fund (MO)	21,766,279	12/31/2013
42	IBM International Foundation (NY)	21,618,005	12/31/2012
43	Alcoa Foundation (PA)	21,517,932	12/31/2012
44	The Pfizer Foundation, Inc. (NY)	21,057,272	12/31/2012
45	Freeport-McMoRan Copper & Gold Foundation (AZ)	20,132,309	12/31/2013
46	The Batchelor Foundation, Inc. (FL)	19,674,515	6/30/2013
47	3M Foundation (MN)	19,143,906	12/31/2012
48	Harold Simmons Foundation (TX)	18,504,715	12/31/2012
49	BP Foundation, Inc. (TX)	18,152,126	12/31/2013
50	Amgen Foundation, Inc. (CA)	17,994,001	12/31/2012



Bequests

\$27.73 In Bequests Were Made In 2013



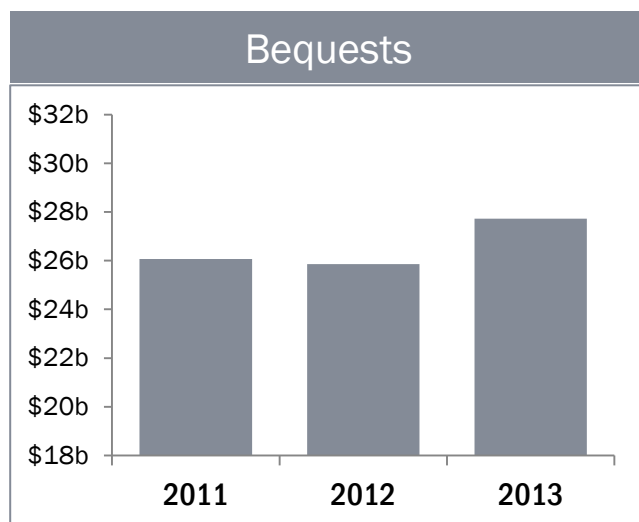
**\$27.73
BILLION**

Roughly 24% of bequest dollars came from estates with assets of less than \$1 million.



THE SHARE OF BEQUEST GIVING BY ITEMIZING ESTATES amounted to \$18.62 billion in 2012, or 80% of the total bequest estimate.

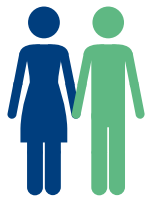
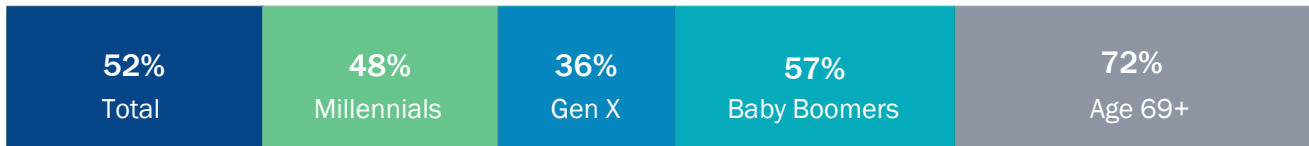
It is estimated that between **\$6.6 TRILLION** and **\$27.4 TRILLION** in charitable bequests will be made between 1998-2052



Where Do Bequests Go?

Preparing The Next Generation For Inheritance

% who have already received a financial inheritance



38%

wealthy parents who expect their children are well prepared to handle their inheritance

92%

of parents believe their children would benefit from a discussion with a financial professional

% who currently own or are interested in owning social impact strategies



43%

of HNW investors agree that investing is a way to express their social, political and environmental values

60%

agree that it is possible to invest based on social or environmental impact while achieving market rate returns

9/10

of HNW investors say they would help foster greater income equality by such actions as supporting education, job creation and education opportunities, and paying more taxes



Non-Profit Review

What Did The Top 50 Nonprofits Raise In 2013?

Rank	Organization	Total Private Support in Fiscal Year 2013
1	United Way Worldwide* · Virginia	\$3,870,132,827
2	Fidelity Charitable, Massachusetts	\$3,671,894,421
3	Salvation Army* · Virginia	\$2,080,242,000
4	Schwab Charitable Fund California	\$1,863,118,878
5	Feeding America, Illinois	\$1,855,398,787
6	Task Force for Global Health* · Georgia	\$1,654,566,955
7	Catholic Charities USA* · Virginia	\$1,645,979,490
8	Silicon Valley Community Foundation California	\$1,384,392,225
9	American Red Cross* · District of Columbia	\$1,079,679,521
10	Vanguard Charitable Endowment Program, Pennsylvania	\$1,032,588,619
11	Food for the Poor,* Florida	\$1,023,163,017
12	Goodwill Industries International,* Maryland	\$974,594,391
13	The Y,* Illinois	\$938,935,000
14	Stanford University, California	\$931,569,265
15	National Christian Foundation,* Georgia	\$911,901,000
16	American Cancer Society, Georgia	\$885,000,000
17	American Lebanese Syrian Associated Charities/St. Jude Children's Research Hospital,* Tennessee	\$851,256,497
18	Habitat for Humanity International,* Georgia	\$850,000,000
19	World Vision, Washington	\$796,365,172
20	Harvard University, Massachusetts	\$792,256,000
21	Boys & Girls Clubs of America* · Georgia	\$766,482,622
22	Lutheran Services in America* · District of Columbia	\$727,192,414
23	University of Southern California, California	\$674,511,824
24	Compassion International, Colorado	\$656,893,101
25	Columbia University, New York	\$646,663,433

What Did The Top 50 Nonprofits Raise In 2013?

Rank	Organization	Total Private Support in Fiscal Year 2013
26	National Philanthropic Trust*, Pennsylvania	\$628,458,759
27	AmeriCares Foundation, Connecticut	\$620,146,474
28	United States Fund for Unicef * New York	\$588,099,639
29	National Academy of Sciences, District of Columbia	\$530,811,360
30	American Heart Association, * Texas	\$520,305,787
31	The Johns Hopkins University, Maryland	\$518,571,245
32	Catholic Medical Mission Board, New York	\$512,905,261
33	University of Pennsylvania, Pennsylvania	\$506,606,961
34	Cru, * Florida	\$503,875,000
35	Nature Conservancy, * Virginia	\$500,008,732
36	Cornell University, New York	\$474,957,281
37	Save the Children, Connecticut	\$455,403,863
38	New York University, New York	\$449,344,241
39	Yale University, Connecticut	\$444,171,386
40	Feed the Children, Oklahoma	\$442,140,619
41	Samaritan's Purse, North Carolina	\$426,382,013
42	Duke University, * North Carolina	\$423,658,375
43	University of California at Los Angeles	\$419,646,679
44	Massachusetts Institute of Technology, Massachusetts	\$414,514,000
45	Direct Relief International, California	\$387,949,323
46	Memorial Sloan Kettering Cancer Center, * New York	\$387,501,930
47	University of California at San Francisco, California	\$385,745,375
48	Mayo Clinic, * Minnesota	\$384,100,000
49	University of Wisconsin at Madison, * Wisconsin	\$360,688,764
50	Jewish Communal Fund, New York	\$359,713,876

25 Largest Online Fundraising Organizations In 2013

	Organization name	Online donations in 2013	Change in online donations since 2012	Private support in 2013	% of private support raised online in 2013
1	Leukemia & Lymphoma Society	\$98,638,429	-2.4%	\$279,789,665	35.3%
2	American Heart Association	\$59,000,000	+15.7%	\$520,000,000	11.3%
3	World Vision	\$41,075,532	-9.5%	\$796,365,172	5.2%
4	National Christian Foundation	\$40,603,000	+23.6%	\$873,676,000	4.6%
5	Campus Crusade for Christ International	\$39,436,778	+16.5%	\$457,385,714	8.6%
6	Salvation Army	\$38,666,885	+24.7%	N/A	N/A
7	Cystic Fibrosis Foundation	\$37,698,052	+18.5%	\$137,312,911	27.5%
8	Young Life	\$31,970,063	+28.0%	\$203,995,710	15.7%
9	March of Dimes Foundation	\$27,487,090	-1.9%	\$192,020,743	14.3%
10	United States Fund for Unicef	\$22,774,873	-26.4%	\$307,005,138	7.4%
11	Global Impact	\$22,051,695	+23.8%	\$99,609,283	22.1%
12	University of Michigan	\$19,709,624	+295.6%	\$351,551,648	5.6%
13	Memorial Sloan-Kettering Cancer Center	\$18,591,065	+35.1%	\$380,499,000	4.9%
14	Dana-Farber Cancer Institute	\$15,920,000	+17.4%	N/A	N/A
15	Christian Broadcasting Network	\$14,884,867	+7.9%	\$181,034,723	8.2%
16	University of Southern California	\$13,044,066	+68.1%	N/A	N/A
17	University of Washington	\$12,415,841	+29.2%	\$338,651,515	3.7%
18	Food for the Poor	\$12,229,855	+17.6%	\$1,025,979,074	1.2%
19	International Fellowship of Christians and Jews	\$12,167,385	+0.9%	\$109,868,182	11.1%
20	University of Pennsylvania	\$11,433,831	+9.0%	\$506,606,961	2.3%
21	Seattle Foundation	\$11,378,173	+48.0%	\$76,676,713	14.8%
22	Ohio State University	\$10,796,586	+55.0%	\$215,800,423	5.0%
23	Save the Children	\$10,512,783	+75.3%	N/A	N/A
24	University of California at Berkeley	\$10,373,794	+33.4%	\$346,718,494	2.0%
25	Make-a-Wish Foundation	\$9,106,000	+15.4%	\$78,498,000	11.6%

How Nonprofits Use Social Media And Content Marketing

89% Of Nonprofits Have A Facebook Page



Facebook & Twitter

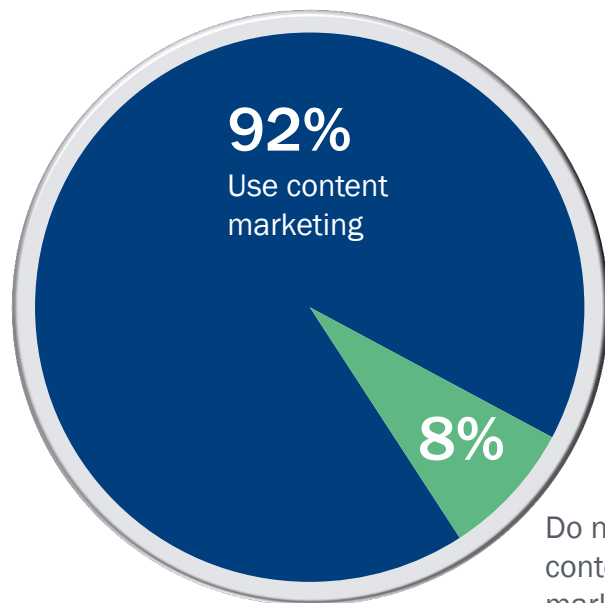
communities grew by 37% and 46%, respectively, in 2013.¹



Average number of Facebook posts per day: 1.2

Average number of non-profit Twitter posts per day: 5.3




Percentage of Nonprofit Professionals Using Content Marketing²



Do not use content marketing

For every 1,000 email subscribers, Nonprofits have ...¹



-  199 Facebook Fans
-  110 Twitter Followers
-  13 Mobile Subscribers

How Millennials Give



87%

of Millennials reported that they gave a financial gift in 2013.¹



44%

volunteered for a non-profit in 2013.¹

25-34 Age

Millennials are between the ages of 25 and 34²

14% population

Millennials make up about 14% of the adult population¹

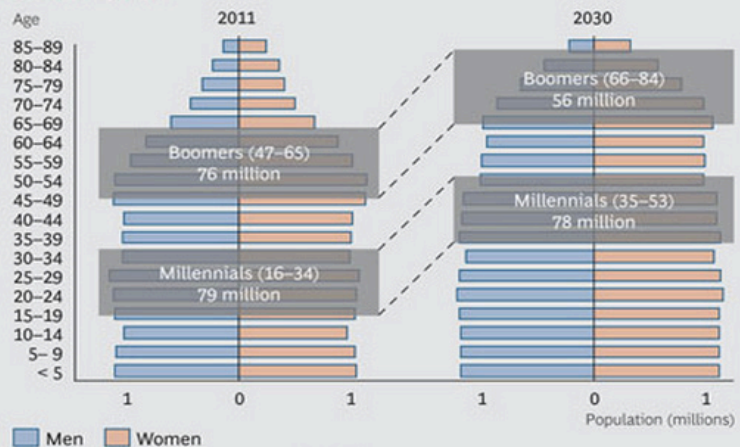
42.8 million

There are 45.8 million people in the Millennial generation²

93% techies

Millennials used a mobile phone in 2012 and among that about 63% used smart phones. Millennials also have the highest penetration of Internet usage, with 93% of Millennials using the Internet, 89% of Gen X and 77% of Baby Boomers.³

U.S. Millennials Will Outnumber Non-Millennials by 22 Million by 2030



Why Does Volunteerism In America Matter?

People Who Volunteer Donate To Nonprofit Organizations¹

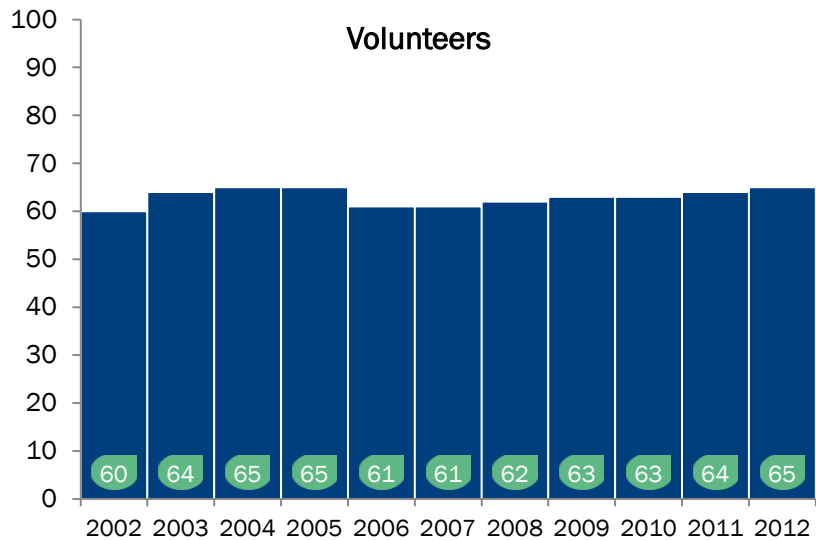


VOLUNTEERS ON THE RISE

34%

of volunteers gave 200 hours or more of their time, while almost three-fourths (74%) of the volunteers volunteered at two or more organizations.²

More high net worth households reported volunteering with two organizations (32%) than one (26%) or three (23%). The highest percentage of households reported volunteering more than 200 hours (34%) between September 2011 and September 2012.²



Source: ¹Giving USA Foundation (Giving USA 2014)
Source: ²2014 U.S. Trust Study of High Net Worth Philanthropy

#GivingTuesday Grew Globally in 2014



100

nonprofit organizations surveyed for #GivingTuesday¹

\$45.7 million

estimated raised on #GivingTuesday²

Ramping up to #GivingTuesday 2014, CCS surveyed nearly 100 nonprofit organizations about their campaign plans for #GivingTuesday 2014 and the difference between these anticipated plans and their involvement with #GivingTuesday 2013. Results revealed that:

- Three quarters of responding organizations that participated in #GivingTuesday 2013 were preparing to participate in 2014.
- Among those organizations participating in both years' events, two-thirds were planning on investing more time and resources into the #GivingTuesday 2014 campaign.
- The vast majority of organizations participating in #GivingTuesday 2014 devoted less than three months of planning time to their campaigns.
- Organizations participating in #GivingTuesday 2014 revealed that they intended to leverage #GivingTuesday 2014 to tell their story, engage new donors and other types of supporters, boost year-end appeals, and improve marketing techniques and donor tracking systems, among other reasons.



Thank You!

Thank you to the following sources for the data used to compile the Snapshot of Today's 2014 Philanthropic Landscape:

- 2014 US Trust Insights On Wealth and Worth
- 2014 US Trust Study of High Net Philanthropy
- Bank of America
- Blackbaud
- Capgemini
- CCS Analytics
- CCS Philanthropy 360
- Content Marketing Institute
- Crowdfunding
- eMarketer
- Gallup Poll
- Giving USA Foundation
- Johnson, Grossnickle & Associates (JGA)
- M & R Benchmarks
- The Chronicle of Philanthropy
- The Foundation Center
- The Giving Pledge
- The New York Times
- Urban Institute
- US Census Bureau

About CCS

1947

Established

9

Executive Offices

200

Professional Staff

95%

Repeat/Referred
Business

15

Core Services

10,000

Satisfied Clients

Who We Are. CCS designs and implements successful, transformative development initiatives for leading Nonprofits across all sectors and throughout the world.

Who We Serve. Our client base spans all recognized non-profit sectors, including national and international charities; public and private colleges and universities; academic medical centers, community and regional hospitals, children's and women's hospitals, cancer centers, and hospices; faith-based initiatives; museums, opera companies, symphony orchestras, dance groups, and theater groups; advocacy groups; global initiatives; medical, professional, and trade associations; environmental and conservation groups; and social service agencies.

What We Do. CCS provides campaign design and management, development and strategic planning services to diverse non-profit institutions worldwide. Specific services include feasibility and planning studies; capital and endowment campaign planning and direction; development assessments; prospect engagement programs, research and screening; research analytics, predictive modeling and benchmarking; board development and training; interim development office management; custom learning; corporate and strategic partnership development; and executive consultation.

Our Leadership. CCS is an independent firm wholly owned by our managing partners. Our leadership team brings a wealth of expertise to every engagement.

Our Advantage - Measurable Results. Trust, innovation and results are the hallmarks of our practice. CCS works in partnership with development staff and organizational leadership to strengthen development capacity. Our focus on sound fundraising principles, combined with strategic and innovative counsel, translates into significant ROI and projects that consistently outperform.

In Summary - Global Reach, Personalized Guidance. Our geographic scope and structure allow us to leverage the full resources of a global consulting firm while also providing personalized, direct guidance and leadership for each client engagement.



About CCS

Our Mission.

Our mission is to help Nonprofits elevate theirs, by providing fundraising counsel, development services, and strategic consulting

Our Core Values.

Integrity – Our service to our clients, our community, and our employees begins with the highest ethical standards in every aspect of our business. We are committed to attracting, teaching, and deploying the highest caliber professionals; providing responsible, informed, and thoughtful counsel; and ensuring effective and sustainable practices to advance the missions of our clients and our firm.

Excellence – Client satisfaction is not enough – we seek to achieve client delight. CCS thrives by helping our clients to champion inspirational causes that improve lives and communities. We believe that striving for excellence in all of our efforts on behalf of our clients and the firm is our personal and professional responsibility. Our reputation requires it and our clients’ missions demand it.

Partnership – At CCS, we believe in the power of “We.” This idea represents our commitment to collaboration, partnership, and teamwork in all facets of our work. CCS fosters collaborative relationships with our nonprofit partners by employing the full resources of our firm to ensure success. Our partnerships succeed through the depth of understanding and experience of our firm’s principals, executives, directors and staff.

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