



# Philanthropic Advisory Services at MakeWay



*Personalized, values-aligned guidance to maximize your impact*



# Philanthropic Advisory Services at MakeWay



## With you every step of the way

At MakeWay, our team is with you on your philanthropic journey to help you align your giving with your values while maximizing your impact.

**We're the only Donor Advised Fund provider in Canada to include integrated philanthropic advisory services in every fund's overhead fees.**

This means you gain clarity and confidence in your decision-making—while remaining the sole advisor directing your fund's philanthropic strategy.



**We offer two tiers of advisory services** designed to meet the needs of diverse Fund Advisors – whether you're an individual, family or organization.

### Integrated Advisory Services

Included in your fund's overhead fees, this service helps you build a giving strategy aligned with your long-term goals.

### Custom Giving Solutions

Tailored advisory services on a fee-for-service basis designed to meet the unique needs of individuals and institutions.



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## Benefits of MakeWay's Philanthropic Advisory Services

- ✓ **Personalized Support** – Meet with your dedicated advisor any time, with an annual check-in to review your fund and goals.
- ✓ **Tailored Recommendations** – Discover MakeWay programs and projects that align with your values.
- ✓ **Planned Giving Guidance** – Receive support for long-term giving strategies, bequests, and legacy contributions.
- ✓ **Hassle-Free Administration** – We handle all donation processing, receipting, and compliance so you can focus on your impact.
- ✓ **User-Friendly Portal** – Manage your fund 24/7 through our secure online platform.





# Integrated Advisory Services



**Every Fund Advisor has access to a comprehensive suite of services to make giving seamless and impactful, all included in your overhead cost recovery fee.**

Meet with your dedicated advisor annually to review your fund and goals, or any time you need philanthropic support.

## Fund Planning

Plan your giving one to ten years into the future. With our expert guidance, we work with you to:

- Define your **philanthropic “North Star”** and set clear priorities
- Develop a **fund management strategy** based on your goal to spend down, sustain or grow your fund over time
- Establish an **annual contribution and granting plan** to keep you on track

## Hassle-Free Administration


Focus on your impact while our team takes care of the administrative side of your fund:

- Streamlined, **bi-weekly grant** processing
- **Due diligence** and transparent approval processes
- **Donation processing**, receipting and compliance
- Manage your fund 24/7 through our **secure, online portal**

## Support for Navigating the Philanthropic Landscape

MakeWay goes beyond just fund administration, providing strategic guidance and connections to make the most of your philanthropy today and in the future.

You'll benefit from:

- **Insights** on charitable trends, strategies and best practices
  - Support for **long-term giving strategies**, bequests and legacy contributions
  - **Connections to MakeWay's ecosystem** of place-based programs and shared platform projects
  - A **community of like-minded funders** and community leaders
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# Maximize Your Impact: Custom Giving Solutions



**For philanthropists and institutions seeking deeper engagement with communities and strategic support from our philanthropic advisory team, our customized services provide data-driven, trust-based strategies to help you maximize impact.**

The table below outlines customized solution options and estimated costs.

*\*Please note that these figures are for illustrative purposes only. We will collaborate with you to develop a tailored proposal and provide a quote based on your specific requirements.*

Solutions	Deliverable	Starting From:
<b>Landscape Assessment and Recommendations</b>	A custom report covering key issues, affected communities, root causes, stakeholder mapping, and strategic recommendation.	\$6,000
<b>Grantee Recommendations</b>	A curated list of 20 charitable organizations, including their missions, activities, and funding recommendations	\$15,000
<b>Multi-Generational Philanthropy</b>	A family-giving framework, legacy planning guidance, and capacity-building tools to foster shared decision-making	\$6,000
<b>Collaboration and Partnership Development</b>	Strengthen relationships with funders, nonprofits, and community leaders to amplify impact around a specific place or issue.	\$10,000
<b>Learning and (Un)Learning Report</b>	A year-in-review analysis, grantee feedback, and a roadmap to deepen your equity-focused giving practice	\$8,000
<b>Social Impact Strategy</b>	A tailored impact framework, project alignment plan, and strategies for amplifying your social responsibility story.	\$12,000



# Get Started With MakeWay



## Advancing equity-driven philanthropy

**For over 20 years, MakeWay has been home to hundreds of advised funds.**

Our unique approach to philanthropy enables nimble, transformative giving, amplifying community-led solutions through flexible tools.



**By partnering with MakeWay, you are helping to:**



**Break down systemic  
barriers in philanthropy**



**Support community-led  
initiatives with  
lasting impact**



**Foster innovative solutions  
for people and the planet**

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