

Philanthropy UK's

Quick guide to philanthropy advisors

In our 'at-a-glance' guide, philanthropy advisors have listed the services they offer. We have presented this in a matrix so you can easily compare providers.

By clicking on the name of the provider in the interactive matrix, you can link directly to the Provider Services appendix. This details their services, their unique selling point and the fees they charge.

If your organisation offers philanthropy advice to donors and you would like to add your services to our ***Quick guide to philanthropy advisors*** [CLICK HERE](#). You will be taken to where you can download a form to complete and email (editor@philanthropyuk.org) back to us.

Explanation of service categories

Mechanisms: The provider will set up vehicles through which clients can give, such as charity accounts and charitable trusts, and will undertake the associated ongoing administration, such as registration with the regulator and reporting.

Donor advised fund: The provider has an established donor advised fund which allows clients to give in partnership with other donors to specific causes.

Tax advice: The provider offers specialist tax advice, planning and structuring services to optimize the tax efficiency of clients' giving.

Donor education: The provider offers advice at various stages of the client's philanthropic journey. This often includes early stage advice to identify clients' motivations to give and may provide workshops through which a client can learn more about ways to give and specific charities and causes.

Donor networking: The provider offers networking events for clients such as forums and workshops or access to their networks.

Charity recommendations: The provider will undertake 'due diligence' work and research into specific charities and rate them against set criteria.

Monitoring and evaluation: The provider offers ongoing monitoring of donations and the impact they make with regular feedback to the client

Cross-border giving: The provider has specialist knowledge, mechanisms or networks that allow them to offer clients the means to give efficiently and effectively across the globe.

Corporate philanthropy: The provider offers advice specifically targeted at companies to help them fulfil their CSR ambitions.

Key

Service provided in-house	●
Service provided in partnership	P
Service offered both in-house and in partnership	●P
Offers advice but no service provided	A
No service or advice provided	—

<i>Specialist advisors</i>	Mechanisms (eg charity trust, charity account)	Donor advised fund	Tax advice	Donor education (early stage advice, mentoring, etc)	Donor networking	Charity recommendation	Monitoring and evaluation	Cross-border giving	Corporate Philanthropy
Asian Foundation for Philanthropy	–	–	–	●	–	●	–	–	●
Association of Charitable Foundations	–	–	–	●	●	–	–	–	–
Charities Aid Foundation	●	●	–	●	●	●	●	●	●
Community Foundation Network	●	●	–	●	●	●	●	–	●
Geneva Global	P	P	–	●	–	●	●	●	●
Institute for Philanthropy	–	–	–	●	●	–	●	–	●
Investing for Good	P	P	P	●	●	–	●	P	●
New Philanthropy Capital	–	–	–	●	●	●	●	●	●
Pilotlight	A	A	A	●	●	●	●	A	A
Stewardship	●	–	●	●	–	–	A	–	–
The Trust Partnership	P	–	P	●	P	●	●	●	●
Theresa Lloyd Associates	A	–	–	●	●	● P	A	P	● P
Thomson Philanthropy	–	–	–	●	●	●	–	–	●

<i>Solicitors</i>	Mechanisms (eg charity trust, charity account)	Donor advised fund	Tax advice	Donor education (early stage advice, mentoring, etc)	Donor networking	Charity recommendation	Monitoring and evaluation	Cross-border giving	Corporate Philanthropy
Bates Wells & Braithwaite	●	A	● P	●	–	–	A	●	●
Farrer & Co	●	–	●	● P	●	● P	–	●	●
Maurice Turnor Gardner	●	A	●	● P	–	P	P	●	●
Withers	●	A	● P	● P	–	P	P	●	●

<i>Wealth Managers</i>	Mechanisms (eg charity trust, charity account)	Donor advised fund	Tax advice	Donor education (early stage advice, mentoring, etc)	Donor networking	Charity recommendation	Monitoring and evaluation	Cross-border giving	Corporate Philanthropy
Barclays Wealth	AP	AP	P	●	●	P	P	P	A
Coutts & Co	●	●	●	●	●	P	● P	● P	A
JP Morgan Private Bank	●	–	P	●	●	P	P	P	A
Spencer-Churchill Miller Philanthropy	–	–	–	–	●	●	●	–	●
Standard Chartered Private Bank	●	P	P	●	–	P	● P	●	●
Stonehage	●	–	●	●	●	● P	● P	●	–

<i>International advisors</i>	Mechanisms (eg charity trust, charity account)	Donor advised fund	Tax advice	Donor education (early stage advice, mentoring, etc)	Donor networking	Charity recommendation	Monitoring and evaluation	Cross-border giving	Corporate Philanthropy
Active Philanthropy (Ger)	P	–	–	●	●	A	● P	P	●
HSC & Company Private Clients (Aus)	●	P	P	●	●	●	●	● P	●
King Baudouin Foundation (Bel)	●	●	●	●	●	●	●	●	●
Philanthropy Ireland (Ire)	P	P	–	●	●	●	●	●	●
Rockefeller Philanthropy Advisors (US)	●	●	–	●	●	●	●	●	●
Tactical Philanthropy Advisors (US)	●	P	–	●	●	●	●	●	–
The Philanthropic Initiative (US)	–	–	–	●	●	●	●	●	●
VALUEworks (Switz)	●	–	P	● P	● P	● P	● P	P	● P
wise (Switz)	–	P	–	●	●	●	●	P	–