

# MSM PHILANTROPY

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**MSM** appreciates that families are looking to give back to their communities that are important to them. Giving money is easy. Giving money wisely is difficult.

**Philanthropy** should be conducted with the same professional approach as investing.

**MSM** is able to provide its clients with various services including:

- Advice on structuring, coordinating and implementing charitable structures working with family advisors and their legal specialists
- Develop and implement systematic and professional processes for gifting
- Introduce families to existing charitable organizations that meet family goals
- Manage the family assets which are consistent with the client's charitable plans

## CASE STUDY - CHARITABLE FOUNDATION

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**Background** - A wealthy European family was looking to donate a significant sum of wealth to global charities and mandated us to manage this process in a professional and transparent manner.

**Co-ordination:** organised through Swiss legal counsel and philanthropy experts the establishment of a Swiss regulated charitable foundation designed to meet the family's philanthropic goals.

**Governance:** recruited senior professionals to serve on the foundation board and ensured that full compliance with regulators and family objectives were met

**Identification of grant recipients:** via its general manager instituted a robust process to identify, vet and monitor suitable charities

**Investment Management:** managed the assets in line with family investment objectives to meet the foundations distribution plans