



# Diana Chambers FAMILY WEALTH MENTORING

*Harmonizing your relationships with wealth and those you love*

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## Strategic Philanthropy

Philanthropy offers an avenue for a rich life with a legacy that extends beyond immediate family.

We work with both new and seasoned donors - individuals, families and foundations - to maximize their impact as they establish their philanthropic initiatives and also review these. Working together with our clients we help:

- Articulate their core values and clarify their philanthropic vision and intent
- Educate them about their philanthropic choices and the decisions of their peers
- Design strategic philanthropic plans to: prioritize and structure their giving, accommodate the different interests of family members and trustees, and measure their progress
- Establish optimal governance structures for their foundations
- Facilitate [family and trustee meetings](#) to evaluate direction, policy and strategy
- Involve their next generation members
- Negotiate terms of their major gifts
- Liaise with their PR officers to receive appropriate recognition for their gifts

Once a philanthropic direction has been set, we offer on-going consultation, as needed, and facilitate an annual strategic plan update.

Our goal is for our clients to derive great satisfaction from their philanthropy while knowing they have made well-placed social investments.



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