

THE POWER OF A CHARITABLE DISTRIBUTION TRUSTEE

Ensuring that your charitable assets will go toward the causes you care about and problems you're trying to solve *beyond your lifetime.*

We are specialized philanthropic advisors. We empower highly successful individuals, families, and foundations to create greater impact and fulfillment through their philanthropy.



ANONYMOUS
Philanthropy

THE CHALLENGE

Many wealthy individuals and families don't have a clear philanthropic legacy plan. Some establish vehicles like trusts, foundations, and donor-advised funds, however few have a dedicated expert deploying these assets. As a result, billions of dollars are given away each year to organizations that the donor would not want funded.

THE SOLUTION

When Anonymous Philanthropy becomes your Charitable Distribution Trustee, we work with you to identify the problems you are most passionate about solving. We develop a customized plan that ensures your assets will always be laser-focused on solving the issues you're most dedicated to.

A CHARITABLE DISTRIBUTION TRUSTEE IS A WIN FOR ALL.



YOUR LEGACY IS OUR ONLY PURPOSE

The world's most successful individuals and families typically have a close circle of trusted advisors. Each is an expert in a field, but they don't have the specialized knowledge needed to supercharge a client's philanthropy.

That's where we come in.

In the role of Charitable Distribution Trustee, our job is to ensure that your legacy philanthropic assets will always be deployed for maximum impact and in alignment with your intent.

PHILANTHROPY IS ALL WE DO

We do not manage, advise, or maintain custody regarding wealth, investments, insurance, taxes, administration of trusts, or such.

KEY BENEFITS TO GRANTOR

- Guidance of charitable giving in perpetuity
- Ensuring philanthropic assets are activated
- Creating leverage beyond traditional grants
- Avoidance of mission drift
- A predetermined distribution schedule
- Reduced friction in roles of heirs

KEY BENEFITS TO ADVISORS

- Maintain legal advisory and oversight
- Continue investing assets until distribution
- Retain control of trust long-term and maintain focus on non-charitable distributions
- Outsource expertise in charitable giving (ie. due diligence, evaluation of charities and partner organizations, etc.)
- Ongoing role as Client Representative

WANT TO LEARN MORE? LET'S TALK!

www.anonymousllc.com



Josh Stamer, Chief Strategy Officer
(949) 922-9366 josh@anonymousllc.com