



Our Professional Outsourced Philanthropic Solutions (POPSSM) platform is an innovative tool created to solve many of the challenges nonprofits face. For more than 160 years, we have provided advice and counsel to nonprofit organizations, and over those years, we have made it our mission to be there to help you achieve your mission. We succeed only when you succeed.

Drawing on the resources of more than 1,200 lawyers, paralegals, trust administrators, information technology specialists, marketing professionals and other staff in 12 offices in the United States and London, the POPSSM platform offers the following core programs:

- Donor Advised Fund Management
- Foundation Management
- Charitable Gift Annuity Management
- State Regulatory Compliance

While many organizations have sought to develop internal resources to address one or more of these functions, we provide an efficient outsourced solution customized to fit within your operations. Donor advised funds, private foundations, educational institutions, religious organizations, healthcare institutions, museums & arts organizations, and housing organizations regularly take advantage of our POPSSM platform as a comprehensive approach to solve their daily needs so that they can better focus on their core programs and activities.

We would be pleased to speak with you to learn about your goals and plans for the future and to review how we may be able to tailor an offering for you. We look forward to starting the conversation.

*Philanthropic **Advice** from a
Law Firm You Can **Trust**.*

Drinker Biddle & Reath LLP

From its founding in 1849 to its present-day status as a leading law firm with a national footprint, Drinker Biddle & Reath LLP has demonstrated a sustained commitment to excellence in the practice of law, public service and a civil society.

Drinker Biddle & Reath combines a comprehensive range of traditional legal practices with significant national roles in such practices as health care, class action defense, corporate and securities, government relations, insurance, energy, education and communications. Our priorities are knowing our clients' business and providing the value they need so that we can be an integral part of their success.

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www.drinkerbiddle.com

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Jonathan I. Epstein and Andrew B. Joseph, Partners in Charge of the Princeton and Florham Park, N.J., offices, respectively.

Professional Outsourced Philanthropic Solutions

Foundation Management



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Foundation Management Services

Our goal is to collaborate with individuals, families, businesses and other stakeholders who are committed to making a positive impact on the world. Our team makes every effort to learn about you, your background, passions and values so that we may better understand your vision in order to allocate the most efficient and effective resources to achieve your mission. The following is a representative list of the benefits and services our team is prepared to offer you:

- A Dedicated Team.** Our core team is led by Drinker Biddle partner Andrew Grumet, who has 20 years of working with philanthropic individuals, foundations and nonprofits. Andrew and his team will provide personalized assistance to you and your stakeholders.
- Scalable Staff of Legal Professionals.** We are resourced to provide a full array of foundation services. Our team of experienced attorneys, paralegals and legal assistants are fully equipped to support you in the maintenance and administration of your foundation.
- Help Desk Support.** Our dedicated call center, open on weekdays from 8 am to 8 pm, is staffed by Donor Service Coordinators (paralegals and legal assistants) who can assist you and your stakeholders with accessing and navigating the online portal, grant management, making new grants, due diligence issues, grant processing and more.
- Online Portal.** A customized, user-friendly online portal offers the ability to connect your entire philanthropic community, including family members, financial advisors, accountants and other stakeholders. The portal allows reporting on valuable foundation activity, as well as serves as a data vault for governance documents, returns and other reports.
- Grant Management Services.** We have the ability to handle the full array of grant management services, including grantee due diligence, all legal aspects of grant negotiation, preparation and implementation of grant agreements and the full suite of expenditure responsibility services.
- Governance.** Our team assists in all matters of governance including coordinating and staffing your Board meetings, reviewing all fund contracts, supervising audit and tax return preparation, and coordinating any necessary state filings.
- Marketing.** Our professionals will help to design and create a customized website and branded materials to educate the public about the foundation's work, highlighting your mission and linking to supported charities, projects and programs.

Foundation Management Team

At Drinker Biddle & Reath we have brought together a team of skilled professionals who have, on average, 15+ years of dedicated experience in their fields. The team has effectively coordinated on successful projects and interface daily with nonprofits, donors, financial advisors and other allied professionals.



What's in it for ...



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