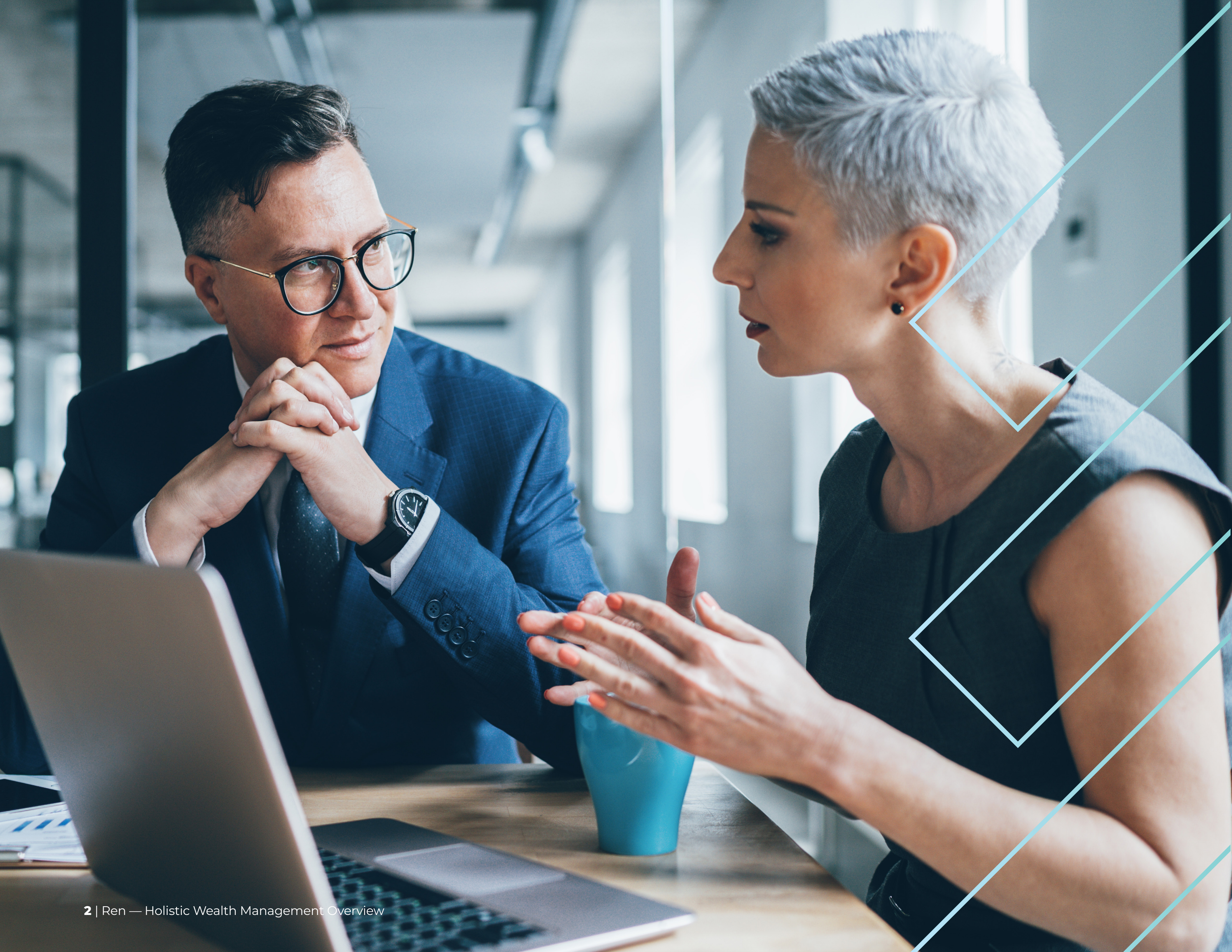
Holistic wealth management includes philanthropy

Easily expand and manage your charitable gift services with Ren

Ren

Powering people, ideas, and institutions for good



Philanthropy and the future of wealth management

With regards to your financial institution's clients, your team's goals are likely twofold — acquiring net new and retaining existing assets. *Philanthropy can help*. It may seem illogical to help your clients give away their money to charity, but they're already doing this. According to a recent study of philanthropy[1], 88% of affluent households gave to charity in 2020.

Philanthropic giving is increasingly a part of financial institutions' services. But when offering advice on giving, financial advisors (FAs) still tend to fall short. **Less than half of high-net-worth individuals report feeling satisfied with the philanthropic discussions they're having with their FAs.**[2] Many institutions are seeing assets leave their management when clients look to alternate organizations to set up giving vehicles.

The ability of your organization to guide clients on philanthropy and offer tax-smart giving strategies can be a competitive advantage. By empowering your team to advise on and establish the appropriate philanthropic vehicles aligning with clients' charitable and wealth management objectives you will position them as trusted advisors that clients will return to again and again.

88% of affluent households gave to charity in 2020[1]

45% are satisfied with philanthropic discussions with their financial advisors[2]

1 https://www.privatebank.bankofamerica.com/articles/2021-bank-of-america-study-how-affluent-households-gave-back-in-2020.html
2 https://tpi.org/resource/2018-tpiu-s-trust-study-of-the-philanthropic-conversation-full-report/

Bring value to your enterprise by helping charitably-minded clients integrate giving within their financial strategy

Grow your business

In managing your clients' giving, their donated cash or assets become part of your company's assets under management, with any revenue generated by investments in giving vehicles kept in-house. Philanthropy may also bring in net new assets not managed by you today.

Establish stronger relationships

Conversations around giving are opportunities to deepen client relationships, building trust and rapport. When your FAs become trusted advisors, clients look to them for advice and are less likely to take their business elsewhere.

Build a path to the next generation

When your FAs successfully build and nurture client relationships, there is a greater probability that your company won't experience assets under management walking out the door and will continue to manage clients' assets when passed on to the next generation. Our solutions are built with the next generation in mind and deliver an experience that meets their ever-advancing technological and engagement expectations.

Ren can help you extend your firm's wealth management offerings and attract new clients with end-to-end philanthropic solutions

Ren — Your charitable giving expert

Let us help you differentiate your brand and increase your institution's clients, assets, and impact with programs that make it easy to integrate charitable giving into your services.

As the largest independent philanthropic solutions provider in North America, our mission is to amplify charitable giving with the expertise, standards, and technology necessary to power growth and scale throughout the philanthropic economy. With Ren, you get the tools you need to deliver a higher level of service to charitably minded clients and win new clients with philanthropic intentions. We offer a complete comprehensive portfolio of charitable gift administrative services to any sized organization by providing services to any charitable giving vehicle.

Find the right giving vehicle to meet your clients' philanthropic goals

Donor-advised fund

Ideal for charitably minded individuals who face capital gains taxes on appreciated assets or estate taxes, and who may want to involve their family in philanthropy.

Charitable gift annuity

An effective solution for donors interested in avoiding taxes, generating lifetime income, and supporting the charity of their choosing.

Charitable lead trust

A powerful charitable planning tool used to generate charitable deductions for income, gift, or estate taxes. The trust makes distributions to charity, and at the end of the term of the trust, the remaining assets revert to the donor or heirs.

Charitable remainder trust

A tax-exempt trust that can liquidate an asset to create two interests: income and remainder interest.

Private foundation

A tax-exempt entity that can receive contributions as a charitable organization under Section 501(c)(3) of the Internal Revenue Code.

Flex giving account

A workplace giving platform that helps companies deepen their corporate culture, inspiring engaging, community-driven philanthropic activities.

Pooled income fund

A charitable trust that combines gifts from a number of donors, investing them together to generate income for income beneficiaries and eventually distributions to charitable organizations.

Pooled special needs trust

A trust that combines and invests assets contributed by multiple individuals to generate funds for individuals with disabilities.

Charitable gift services aren’t just a line of business for Ren, they’re our only business

Turn to Ren for a full-service, end-to-end charitable giving experience that removes the friction from philanthropy.

We support all of your back-office accounting tasks so you can focus on your core business — managing investments. Our team takes care of the administration around giving vehicles so you don't have to — from filing state and federal tax returns to income calculations and payments to beneficiaries to grant vetting and due diligence.

Our company is uniquely positioned as the provider of mission-critical, cloud-based software and services for the philanthropic community. With Ren, you get the tools you need to deliver a higher level of service to charitably minded clients and win new clients with philanthropic intentions.

Renaissance Charitable

Any donor, any gift, any charity

Establishing and managing a charity is outside the core competency of most financial organizations. As an IRS-recognized 501(c)(3) organization, Renaissance Charitable Foundation (RCF) can serve as the sponsoring charity for your clients' donor-advised funds. At no additional expense, RCF is a convenient option if your organization doesn't already have a sponsoring charity.

RCF stands out because of its ability to help any donor contribute any gift to any public charity — and that includes cryptocurrency. Cash and marketable securities are still the most popular gifts contributed to donor-advised funds but RCF accepts gifts of real estate, IRAs, business interests, and S-Corporation stock.

Team up with Ren, focus on your clients

Program design and implementation	Front- and back-office operations	Legal services
Program growth advisory	Accounting and compliance	Tax preparation

We cover the administrative duties, so you can focus on your business

Our team assists organizations, attorneys, and estate planners nationwide with the design, drafting, and funding of thousands of customized giving vehicles.

- Our comprehensive services include the design, implementation, and administration of scalable and sustainable philanthropic giving programs — supporting your organization with a full range of giving vehicles to engage your target clients.
- Our expertise in systems, processes, and best practices allows us to complete front- and back-office operations at a lower cost, more efficiently, and with greater accuracy. Our partner organizations experience an average 26% reduction in overhead costs.
- Ren provides expert legal services and counsel for your front-line professionals and customers, as needed. We partner with you to ensure compliance with all federal legislative and regulatory laws applicable through each stage of planning and administration.
- Many of our clients enlist the services of our program growth advisory. Customers taking part gain a dedicated implementation team that works to ensure the future success of the program, and provides the tools and resources needed for growth.
- We offer complete accounting, sub-accounting, and IRS compliance services for all of your giving vehicles. Our team gives daily attention to your tax preparation needs, meeting the tax status and annual filing requirements necessary and ensuring peace of mind.

Move to next-generation philanthropic management

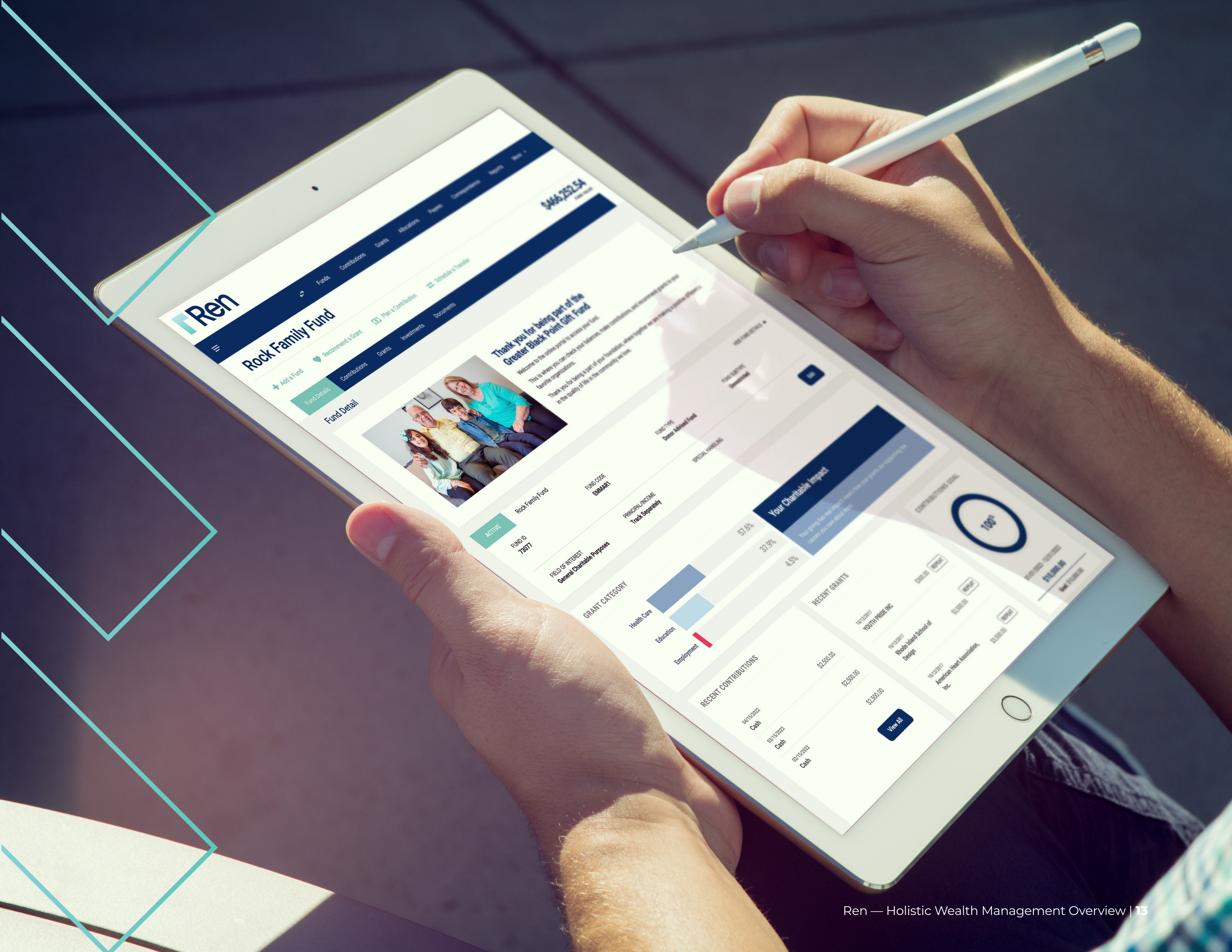
When you use Ren Giving to set up and manage the administration of your financial institution's charitable gifts, you gain access to the next generation of philanthropic management.

Our dynamic, mobile-responsive, and cloud-based planned giving account management platform provides a secure and configurable interface for your FAs, program staff, and clients for all giving vehicles. Ren Giving helps you move beyond the transactional to a platform tailored to your institution's needs and expectations.

Today your clients have higher expectations of how they want to interact with charities as well as a desire for greater insight into how their charitable dollars are used. They want to see their social impact, view their progress towards philanthropic goals, and explore relevant custom content to help them meet their objectives. Ren Giving delivers, all within a simple, intuitive, and responsive platform.

Keep your brand in front

To ensure a holistic wealth management experience — **even down to your philanthropic offerings** — your brand can be extended to Ren Giving via our white-label offering. Our team will work hand in hand with yours to customize the platform to fit your corporate identity, as well as tailor it to align with your company's specific needs. Clients and advisors feel more comfortable working in a familiar environment and your firm adds to its role in your clients' financial lives. Sub-branding is also possible, creating a separate visual identity for divisions and groups within your enterprise.



Ren
Rock Family Fund
Funds
Contributions
Grants
Allocations
Payees
Correspondence
Reports
More
$466,252.54
Add a Fund
Recommend a Grant
Plan a Contribution
Schedule a Transfer
Fund Details
Contributions
Grants
Investments
Documents
Fund Detail
Thank you for being part of the Greater Black Point Gift Fund
ACTIVE
Rock Family Fund
FUND ID
73077
FUND CODE
EMMAR1
FUND TYPE
Donor Advised Fund
FIELD OF INTEREST
General Charitable Purposes
PRINCIPAL/INCOME
Track Separately
SPECIAL HANDLING
GRANT CATEGORY
Health Care
Education
Employment
57.6%
37.9%
4.5%
Your Charitable Impact
CONTRIBUTIONS GOAL
100%
RECENT GRANTS
YOUTH PRIDE INC
Rhode Island School of Design
American Heart Association, Inc.
RECENT CONTRIBUTIONS
Cash
$2,500.00
View All

Ren Partner Program

As an alternative to our full white-label philanthropy solution, onboarding with the Ren Partner Program gives full access to Ren Giving without extending your own brand into the platform.

The Ren Partner Program helps custodians, broker-dealers, registered investment advisor (RIA) firms, and fund companies retain and grow assets under management by helping them include philanthropy as part of a holistic client approach. Unlike many other partner programs in the philanthropic space, we start our work together by deeply understanding your organization as well as your drivers and goals. Then, together we build a program that establishes a foundation for growth and results in giving programs that thrive.

Advisor education and support deliverables

- Webinars – both live and recorded — that cover a wide range of planned giving topics. *As a note, many of these sessions are eligible for continuing education (CE) credits.*
- In-person training at sales meetings.
- Blog posts that put the training materials into practice.
- Marketing materials that help FAs position and sell giving vehicles.
- Donation or investment support for complex or alternative assets.
- Case design assistance that supports FAs in illustrating the value of various giving options and scenarios.

Partner advantages

- Introduction to new philanthropic strategies.
- Participation at conferences and other events, both as speakers and sponsors.
- Access to Ren's 30+ years of thought leadership.
- Metrics that help measure success.

Do what you do well and leave giving to us

Get to market fast

You don't need to be a tech company to build your own platform, you can create a customized solution with Ren Giving. In about 90 business days we'll get your tailored system up and running.

Gain flexibility and scalability

Every organization runs its programs differently and Ren Giving is completely configurable to accommodate the unique processes and workflows needed for your organization to run efficiently. Given its modular architecture, as your assets and number of users grow, the Ren Giving platform easily scales to meet your charitable giving needs.

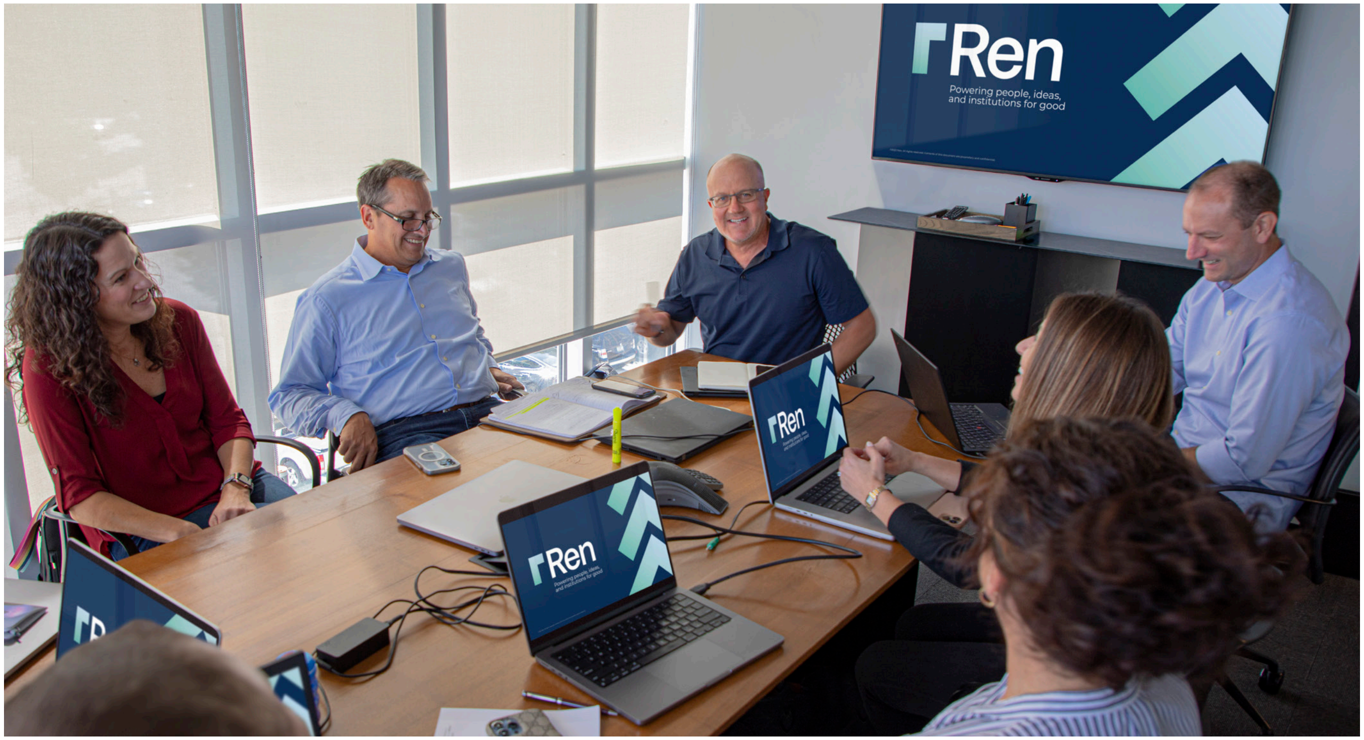
Establish a foundation for success

Your success is our success. At Ren, we have an entire department dedicated to the successful roll-out and support of new programs as well as all of the collateral and training support your FAs need. All to help your team grow their assets under administration.

Ren at a glance

With more than 35 years of experience in charitable gift services, we currently support more than 140 institutions — including financial firms, large and small nonprofit organizations, universities, and community foundations — and provide the expertise, standards, and technology these organizations need to attract new clients while keeping current ones happy and engaged.

Established in **1987**	**North America's largest** independent charitable services provider	Supports **all** charitable gift vehicles
More than **$100 billion** in charitable assets	More than **345,000** accounts	**1.4 million** individual grants distributed annually



Ren provides you with a dedicated service team who communicates with you and your staff daily in the administration of your accounts. In addition, we schedule weekly calls to discuss joint strategic planning and solicit feedback from your team. This allows us to plan for the growth of the program, introduce platform enhancements, and coordinate schedules for peak times.

Regarded industry-wide as subject matter experts in the field of charitable giving, our associates include lawyers, accountants, MBAs, and CFPs as well as client service, IT, and operational experts. Our team has more than 850 years of combined planned giving and philanthropic knowledge, with an average leadership tenure of 16 years.

Contact us today about philanthropic giving at consulting@reninc.com

Ren

Powering people, ideas, and institutions for good

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