



## Philanthropic Services

### People

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Philanthropy is more than just giving money away—wealthy families drive change, create a legacy, and demonstrate enduring family values through well-planned giving.

Whether a family is making their first major gift or transitioning governance of an established family foundation, **Sentinel Trust is an experienced partner in family philanthropy.**

Our capabilities include:

- Incorporating philanthropy in estate and wealth planning.
- Comparing charitable vehicles and recommending the best fit for a family's needs.
- Analyzing grantmaking history to determine trends and effectiveness.
- Conducting due diligence on charities.
- Using family philanthropy as a wealth education tool for the next generation.
- Developing a family philanthropy mission statement.
- Advising on major gifts to ensure the donor's intent is preserved.
- Identifying low-basis assets to use for charitable giving without realizing capital gains.

**Sentinel Trust's family office services extend to family foundations and charitable trusts.** We provide administrative support by collecting and organizing grant requests, processing grant checks, managing acknowledgment letters, and advising on matters necessary to keep the entity's tax-exempt status. Our investment platform is adaptable to non-profit entities and we take caution with investments that generate Unrelated Business Taxable Income.

With Sentinel Trust's help, families can focus purely on the joy of giving.