For decades, families of wealth and industry experts have turned to the FOX Library and Resource Toolkits for its collection of thought leadership, proprietary research, and tools that address their needs and concerns. With the FOX community in mind, this Resource Toolkit is provided to help families and their trusted advisors be well informed, prepared, and armed with solutions and expert insights on the topics of interest. Download the curated resources and share them with your network for further discussions and planning opportunities. For more thought leadership and best practices, explore the full FOX Library.

Donor-Advised Funds

- Deploying DAFs Strategically to Realize the Family's Philanthropic Vision (podcast)
  by Family Office Exchange, 2024

  Donor Advised Funds (DAFs) and private foundations have emerged as powerful and popular vehicles to help families put their philanthropic capital to work. In this FOX CEO Series podcast, Kim Ledger, Senior Vice President of Comple Assets for Ren, Inc. offers an overview of the benefits of DAFs and a primer on how they can help families fulfill their purpose and vision and support the communities and causes that are important to them. Kim also discusses one very practical and increasingly common philanthropic vehicle among enterprise families—the business interest gift.

- Options for Family Philanthropy: Comparing Donor-Advised Funds and Private Foundations
  by National Center for Family Philanthropy, 2020

  When starting with family philanthropy, a family can choose a donor-advised fund or establish a private foundation. Each option has different requirements and management issues, including start-up costs, privacy matters, control of grants and assets, and flexibility in impact investing. Serving as a general guidance for you and your experienced advisor, this chart provides comparison data between donor-advised funds and private foundations that can help you choose the option that is best for you and your family.

Donor Intentions

- Philanthropy in Complex, Multi-Generational Families: Balancing Individual Preference with Collective Purpose (the full report)
  by National Center for Family Philanthropy, 2023

  As philanthropic families evolve, they face common dilemmas regarding their philanthropy—most critically, the choices they make about balancing the individual philanthropic priorities of their members with a collective family philanthropic endeavor. Exploring it further, there are lessons on the ways that families can best design their philanthropy systems—including the family foundations embedded in them—to create impactful giving, positive experiences for family members, and stronger family relationships.

- Advisor Peer Dialogue: Moving Donors from Reactive to Intentional Giving (forum event)
  by Family Office Exchange, 2022

  While it is a challenge to move donors from a reactive position to an intentional giving mindset, there are proactive steps and a strategy to help achieve that transition and into a sustaining, long-term partnership of giving. In this peer dialogue event, Erinn Andrews, Founder and CEO of GiveTeam, outlines the strategy in three parts: (1) the donor journey; (2) developing a strategy; and (3) finding organizations to fund.

- Philanthropic Purpose: Defining Your Motivations, Values, Principles, and Priorities (webcast and report)
  by National Center for Family Philanthropy, 2022

  While it can be difficult to answer, defining and articulating a clear philanthropic purpose should be your north star. Designed to help take stock of your values and understand the passions and experiences that have shaped your family, this webcast and primer offer clarity and direction.

Family Engagement in Philanthropy

- A Guide to Meaningfully Engaging Next-Generation Adults in Your Philanthropy (webcast and report)
  by National Center for Family Philanthropy, 2024

  One of the most important moments in a family's philanthropy is when those who are currently managing the giving formally welcome members of the next generation—or generations—into the work. While the details of each family's experience are unique, there are several common insights that can best position leaders to intentionally evolve their family's philanthropic leadership and family engagement in philanthropy.

- Navigating Family Philanthropy (videos and articles)
  by National Center for Family Philanthropy, 2023

  Every philanthropic journey is unique, but there are points at which all families must make decisions. This series of seven short videos offers a comprehensive introduction and refresher to critical concepts to consider at each stage of your family philanthropy—from philanthropic purpose and selecting giving vehicles, to operations, succession, and legacy. Additional resources and insights are provided on each topic to further help you navigate your philanthropic giving and strengthen your family engagement.

- Legacy in Family Philanthropy: A Modern Framework Workbook
  by National Center for Family Philanthropy, 2023

  Through interviews with dozens of donors, Legacy in Family Philanthropy: A Modern Framework, explores both big concepts and practical matters that include how multigenerational families can—and do—navigate conversations about legacy. While Legacy in Family Philanthropy offers an overarching framework and legal considerations in this companion workbook, there are also stories, practical tips, and discussion starters for families and donors seeking to strengthen their family engagement in philanthropy.

- Putting the "Family" in Family Philanthropy
  by Wilmington Trust, 2023

  For many individuals, philanthropy is one of the more gratifying parts of estate planning. Adding in a multigenerational component—one that involves the family's needs, interests, assets, and goals—can make it even more meaningful and compelling. With the focus on the family and through open channels of communication, philanthropy can be an excellent vehicle for transmitting family values and working together.

- How to Help Your Teens Discover Their Philanthropic Passions
  by Ascent Private Capital Management of U.S. Bank, 2022

  Teaching the joys, benefits, and responsibilities of philanthropy is often a top-down process. For most families, the starting point in encouraging a philanthropic mindset in children is to identify specific values that matter to them and to live by those values. Most important, continue to set a good example through meaningful actions and active giving plans.

- Breaking Up: Divorce in Family Philanthropy
  by National Center for Family Philanthropy, 2022

  This guide is part one of a two-part series on divorce and division in family philanthropy, featuring tips for what board and staff members can do to prepare and cope. It includes case studies on family foundations who have navigated divorce, questions to consider when developing board policies, and perspectives on the implications of divorce on assets and grantees. Learn more by reading part two, Breaking Up: Division in Family Philanthropy.

- Meetings Matter: A Practical Guide for Philanthropic Families
  by National Center for Family Philanthropy, 2021

  This guide offers tips on running a smooth meeting, based on the close consideration of the purpose, outcomes, process, and people involved. Constructive templates are also provided to help you think through the key nuts and bolts of designing a great meeting.

Family Foundations

- Family Philanthropy Trends 2025 and Survey Results of Family Foundations
  by National Center for Family Philanthropy, 2025

  In the quest to generate positive social change, family philanthropies face diverse and sometimes competing perspectives. They also must sort through an overwhelming amount of information to make good decisions—and often, that information is too general or limited to be useful. With this research report, clear and focused data goes a long way toward helping families make confident decisions for their family foundations and at each inflection point in their philanthropy. In particular, you can see the ways in which family philanthropy has—or has not—embraced and applied the four principles of effective family philanthropy: accountability, equity, reflection and learning, and relationships.

- Building the Board Your Foundation Deserves: The Governance Checklist
  by National Center for Family Philanthropy, 2024

  While there are good resources to help family foundation boards identify common and effective practices in each area of governance-related questions, this guide focuses less on the outcomes and more on ensuring that all of the issues are considered for building the board your foundation deserves. Used as a roadmap rather than a point of destination, this practical guide covers many areas of family foundation governance, including: (1) foundation needs and expectations of board members; (2) board composition, selection, and terms; (3) board committees and decision making; and (4) board assessment and renewal.

- Top 10 Advantages of Having a Private Foundation
  by Foundation Source, 2023

  Some families start a private foundation because they want to give back while others are seeking tax savings. Whatever the impetus, private foundations serve as a powerful and flexible philanthropic vehicle and offer tremendous advantages over giving as an individual donor.

- Foundation Transitions: A Guide for Wealth Advisors
  by Foundation Source, 2023

  Because nearly 90% of all foundations are set up with the intent to exist in perpetuity, their success depends on their ability to prepare for and manage change. The challenge isn't merely a transition, but also the internal stress of balancing the energy and engagement of new blood with the experience and traditions of its senior members. Based on over a decade of experience supporting over 2,000 foundations, this booklet provides pertinent discussion points for each of these common transitions and what to consider at each juncture.

- Private Foundation Succession Planning (webcast)
  by Foley & Lardner, 2022

  During this two-part webinar presentation on private foundation succession planning, insights and planning tools are outlined and discussed to help the next generation of decision making. While there are different approaches to succession planning, knowing the donor intention is essential. Other planning elements and considerations include a mission statement, successor decisionmakers, checks and balances, spend-down division, and enhanced flexibility.

- How Private Foundations Can Unify Intergenerational Families
  by Ascent Private Capital Management, 2021

  Finding a way to facilitate trust, communication, and proper preparation and development of the necessary skill sets of the next generation can be difficult and will vary from family to family. Today, many families are finding answers to these questions through a private family foundation.

- Making a Difference: Private Foundations
  by BDO, 2020

  When the next generation experiences the satisfaction of making a positive impact on the world, it can demonstrate to them the value of working together as a family for a common purpose and help prepare them for their transition to leadership roles in the family wealth enterprise when the time comes. There are many types of philanthropy that a family can engage in, and one way to do it is by establishing a charitable organization, including a private foundation that is designed to further the family's philanthropic goals.

- Thrive at Five: The Secrets of Long-Term Philanthropy
  by National Center for Family Philanthropy, 2018

  If you are a newer family foundation with one or two generations on the board, five generations may seem like a long time away. Yet in family philanthropy, quite a few foundations have been operating and thriving for 50, 75, even 100 years. What's the secret of these family philanthropies that make it five generations, and across family branches? How do they successfully attract and engage younger family members? Learn from what other thriving family foundations have done—and continue to do—to sustain a successful long-term family philanthropy.

Grantmaking Process

- Nonprofit Grantmakers Benchmarking Report
  by BDO, 2023

  Beset by economic uncertainty and increasing demand for funding, grantmakers and family foundations find themselves at a pivotal moment as they adapt to a changing environment. With this breakout report, grantmakers will learn how their peers are approaching the challenges ahead of them, including mitigating the effects of inflation, addressing the talent crunch, and investing in technology to increase their agility and flexibility to further help the needs of their grantees.

Philanthropic Governance

- The Essentials of Good Governance: Fundamentals of Family Philanthropy (webcast)
  by National Center for Family Philanthropy, 2023

  There are many governance constructs that support an effective board, and different methods to engage family within each construct. But what are the common elements that contribute to an effective board across all governance constructs? In this webcast, learn the "nuts and bolts" of good governance that can serve as a guiding framework for your family philanthropy's long-term success.

- Family Giving Primer: Succession and Legacy
  by National Center for Family Philanthropy, 2022

  What is the consequence of your philanthropy and who will steward future efforts? Legacy requires creating and implementing plans for donor intent, lifespan, continuity, and succession. With this primer, explore how to define and build your legacy and prepare for transitions.

- The Family Governance Pyramid: Enhancing and Guiding Your Family Philanthropy
  by National Center for Family Philanthropy, 2021

  Just as government and businesses require sound governance to do their work well, so too do families—and their philanthropy. The Family Governance Pyramid provides a model and framework for philanthropic families that is even more relevant and necessary today than when it was first introduced nearly two decades ago. This article provides some perspective on why, and how, families can apply this model to their family and philanthropy, for the good of all.

- Demystifying Decision Making in Family Philanthropy
  by National Center for Family Philanthropy, 2021

  By examining the kinds of decisions that family foundations often face, this issue brief sets out practical, easy-to-apply guidelines for ensuring that the foundation's decision-making method that can work for your family.

Philanthropic Impact Measurement

- Family Giving Primer: Assessment and Learning, Identifying Methods to Measure Success
  by National Center for Family Philanthropy, 2022

  Effective philanthropy is a process of continual learning. An assessment plan will help you define and measure the progress of your partners, your strategy, and the governance and operations of your social impact vehicles. Find out how to create a robust learning agenda and assessment plan.

- Assessing Impact
  by Rockefeller Philanthropy Advisors, 2020

  This guide reviews various ways to assess philanthropic impact. It looks at what assessment can accomplish and what it has difficulty measuring. It sets out a series of questions donors can ask as they consider how to proceed with their philanthropy.

Philanthropic Investments

- Benefits of Donating Cryptocurrency to Charity
  by Schwab Advisor Family Office, 2022

  For charitably minded individuals, cryptocurrency investments—such as Bitcoin and Ethereum—held more than one year may provide a unique opportunity to leverage highly appreciated assets to achieve maximum impact with charitable giving. By donating cryptocurrency to charity, it can also unlock additional funds in two tax-smart ways.

Philanthropic Mission and Strategies

- Overcoming Psychological Barriers to Giving (webcast and report)
  by National Center for Family Philanthropy, 2024

  Even the most enthusiastic and driven donors often become overwhelmed and anxious, causing them to put off, stall, or curtail their giving, which in turn, hinders impact and strips the joy out of philanthropy. In this report, we explore the behavioral science behind the ten most common barriers to giving—such as too many choices, fear of uncomfortable family dynamics, and lack of urgency—and provide effective and actionable ways for you to overcome those barriers.

  Watch the webcast and hear directly from the report's researchers to explore how these insights can strengthen your practice and approach to serving donor families.

- Navigating Family Philanthropy: Defining Your Philanthropic Purpose + Family Road Map Workbook
  by National Center for Family Philanthropy, 2024

  Family philanthropy can be transformative for both family members and the communities they serve, sometimes with an impact that lasts generations. However, achieving a positive, enduring impact requires purposeful decision making throughout the lifespan of the family's philanthropic work. This guide contains worksheets that first help you, as an individual or couple, clarify or update your personal philanthropic purpose and plan. Next, there are tips to help your family draft or update a shared purpose and plan which you'll document in the separate Family Road Map companion to the guide.

- Reimagined Philanthropy, Volume 1: A Roadmap to a More Just World
  by Rockefeller Philanthropy Advisors, 2024

  Reimagined Philanthropy is your indispensable guide to navigating the dynamic landscape of giving. Whether you're just starting your philanthropic journey or looking for new ways to go deeper in your giving, the insights and tools shared here will empower you to architect positive change with intentionality, structure, and focus. Designed for emerging philanthropists, this two-volume book by Rockefeller Philanthropy Advisors provides a solid foundation by addressing mindset, goal setting, approaches, innovative grant support, power of data and evidence, talking to your family, and impactful ways to assess and enhance giving.

  Continue accelerating your philanthropic impact with more actionable insights from Volume 2. Together, both volumes will guide you in fulfilling your philanthropic vision and mission.

- Schwab Charitable Giving Guide
  by Schwab Advisor Family Office, 2023

  Based on "The Stanford PACS Guide to Effective Philanthropy" and "The Philanthropy Toolkit: An Introduction to Giving Effectively," this Charitable Giving Guide provides donors with a comprehensive resource to help maximize the impact of their philanthropic giving. By selecting one or more sections that align with your most immediate needs, you can tailor your experience by the topics that interest you.

- [The Broad Array of Charitable Giving Vehicles Demystified]
  by Wealthgate Trust Company, 2023

  By recognizing there are various charitable giving vehicles—including donor-advised funds, charitable remainder trust, and CRUTs—that donors use to engage in philanthropy, there is also the recognition that there is no single method that is a universally perfect solution and that there are donors who may wish to utilize more than one structure. So how do families know which charitable structures will work for them? It takes a thoughtful approach that includes beginning with a framework for discussing a donor's philanthropic intentions, reviewing the various charitable vehicles that can be used, and looking at the comparative charts to identify when each option might best be utilized.

- Thinking Strategically About Charitable Giving
  by William Blair & Company, 2022

  Charitable giving takes careful planning and an in-depth understanding of the various vehicles that can be used to facilitate your charitable gifts and the tax laws related to those gifts. Beginning with three key questions to ask yourself, this guide helps you develop your philanthropic strategy that must also be designed as an integrated piece of the family's comprehensive wealth-management plan.

- Charitable Giving: Three Elements of a Successful Plan
  The Vanguard Group, 2022

  Charitable giving is an important goal for many investors. Although any form can be beneficial, proper planning of the when, what, and how can help maximize the donor's philanthropic as well as overall wealth planning goals. In examining some common charitable giving strategies, the advantages and disadvantages are discussed, and examples are presented to illustrate the potential impact.

- Family Offices: Best Practices for Philanthropy
  by Plante Moran, 2022

  Family offices are often tasked with managing a family's philanthropy but may have limited knowledge and resources. Several best practices can help both families and family offices lead philanthropic efforts to heighten their impact.

- Unblurring the Boundary Between Philanthropy and Impact Investing for Families
  by Cambridge Associates, 2022

  Families of wealth often ask for views on two related topics—how to think about philanthropy versus impact investing and how to best implement a socially and/or environmentally impactful investment strategy. While common themes transcend these topics, each is distinct and presents an opportunity by allowing families to engage in a powerful combination of both philanthropy and impact investing.

- Next Gen Philanthropy: Finding the Path Between Tradition and Innovation
  by Rockefeller Philanthropy Advisors, 2020

  Applying a broader parameter—one without a reference to age and with deference to each individual—the next generation philanthropists are people who see themselves as descendants rather than ancestors, who want to use their wealth to be of service to others. With the goal of inspiring next generation philanthropists to dream and consider new possibilities, this guide offers both thoughtful recommendations and a series of questions that every next generation donor should carefully consider on the philanthropic path.

Philanthropic Administration

- Family Giving Primer: Operations and Management
  by National Center for Family Philanthropy, 2022

  One of the critical considerations you and your family must define is how best to manage the operations of philanthropy. This primer will help you understand aspects of administration and explore your options for getting the job done.

- Fundamentals of Family Philanthropy: Staffing for Success (webcast)
  by National Center for Family Philanthropy, 2022

  Professional staff is an essential element of an effective family philanthropy effort; however, it can be a difficult construct to navigate. In this webcast, learn how to hire and prepare your staff for success in family philanthropy.

- Accounting and Tax Trends in Philanthropy (video)
  by BPM, 2023

  The quest for nonprofit funding and ways to obtain it continues to evolve while donors want to know the impact of their funds. In this discussion, BPM's Daniel Figueredo and Tami McInerney explore the tools commonly used by funders and when one of them might be appropriate for your given situation. They also review important accounting and tax implications of each of the funding mechanisms, including conditional grants, donor-advised funds, mission-related investments, and impact investing.

Philanthropic Planning Tools and Templates

- FOX Member Templates include sample philanthropic planning profile, family giving considerations worksheet, investment policy statement for a foundation, and other helpful tools and illustrations to meet your philanthropic goals.

For more expert insights and guidance on other topics of interest, explore the full collection of Resource Toolkits inside the online FOX Library.