



Private Foundation Organizing/ New Nonprofit Start-up Case Study

Highlighted Results

*New passions captured,
from business to
philanthropy*

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*Highly effective  
foundation managed  
while starting new  
nonprofit organization*

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*\$20 million given to
best of class charities
over 7 years*

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*\$900,000 charitable  
fund established at local  
Community Foundation*

### Featured Project

A business owner creates a private foundation and nonprofit after selling a business.

### The Challenge

The client was a successful third generation owner of a family business. During his leadership, the enterprise grew dramatically and was subsequently sold. A significant portion of the proceeds was used to create a private foundation.

This foundation was to be the platform for the donor to express his faith and his longing to change the world. As the giving interests were becoming clear, the donor found qualified nonprofit leaders in the city with whom he could partner but no one in the area that interested him most - spiritual formation for Christian Pastors. He chose to create an organization to respond to this need while continuing his giving to the inner city.

### The Legacy Group Execution

The Legacy Group

- Mapped the original giving intention of the founder and helped articulate a foundation mission that could be understood by best of class grant seekers.
- Discovered through “on the ground” research the best of class organizations in the inner city with whom the foundation should partner.
- Provided all staffing for the operation of the foundation, nurturing grantee relationships, handling internal administration, collaborating with other advisors.
- Provided guidance for the start-up of the new nonprofit organization including strategic planning, organizational development, branding, staff recruitment and management.
- Engaged the adult son of the founder as an intern, introducing him to the world of generosity and responsibility.

### The Legacy Group Impact

- The founder captured new passions, from business to philanthropy.
- The founder was fully engaged as much or as little as he wished and balanced a highly effective foundation and new nonprofit organization with extensive international travel.
- Over seven years, \$20 million was given to best of class charities.
- Over seven years, 5000 Christian pastors became better equipped to lead their congregations.
- The son of the founder established a \$900,000 charitable fund at a local Community Foundation and makes grants to charities that work with inner city youth and the outdoors.

Client reference available upon request