

# synchrony philanthropic financial planning

**synchrony philanthropic financial planning** represents a strategic approach to integrating charitable giving with comprehensive financial management. This methodology combines the goals of wealth preservation, tax efficiency, and impactful philanthropy to create a balanced financial strategy tailored to individual or organizational values. By aligning financial objectives with philanthropic aspirations, synchrony philanthropic financial planning helps donors maximize the benefits of their contributions while ensuring long-term fiscal health. This approach encompasses various tools such as donor-advised funds, charitable trusts, and estate planning to optimize the timing and structure of donations. Additionally, it addresses risk management, asset allocation, and liquidity considerations within the context of charitable commitments. This article explores the foundational principles, benefits, and practical strategies involved in synchrony philanthropic financial planning. It also provides insights into how donors can effectively coordinate their financial resources and philanthropic goals to achieve lasting social impact.

- Understanding Synchrony Philanthropic Financial Planning
- Key Components of Effective Philanthropic Financial Planning
- Benefits of Synchronizing Philanthropy with Financial Planning
- Strategies and Tools for Synchrony Philanthropic Financial Planning
- Challenges and Considerations in Philanthropic Financial Planning

## Understanding Synchrony Philanthropic Financial Planning

### Definition and Overview

Synchrony philanthropic financial planning refers to the deliberate coordination of charitable giving with an individual's or entity's broader financial plan. This process ensures that philanthropic efforts are aligned with financial goals, tax strategies, and wealth management objectives. It moves beyond ad hoc donations by integrating philanthropy into the overall financial roadmap, thereby enhancing the efficiency and impact of giving.

### Historical Context and Evolution

The concept of combining philanthropy with financial planning has evolved alongside the growth of wealth management and tax regulations. Initially, charitable giving was often treated as a separate activity from financial planning. However, as tax laws grew more complex and the role of philanthropy in wealth transfer became more significant, financial advisors began promoting synchrony philanthropic financial planning to optimize both giving and legacy planning.

# **Key Components of Effective Philanthropic Financial Planning**

## **Goal Setting and Alignment**

Setting clear philanthropic goals is essential to synchrony philanthropic financial planning. Donors must identify the causes they want to support and quantify their desired impact. Aligning these goals with financial objectives such as retirement planning, estate considerations, and liquidity needs ensures a harmonious approach to wealth and giving.

## **Tax Planning and Efficiency**

Tax considerations play a central role in philanthropic financial planning. Effective strategies leverage tax deductions, credits, and exemptions related to charitable contributions to minimize tax liabilities. Coordinating the timing and structure of donations can maximize these benefits while supporting the donor's financial stability.

## **Asset Management and Allocation**

Integrating philanthropic commitments with asset management ensures that liquidity is available for charitable activities without jeopardizing investment goals. Asset allocation strategies can be adjusted to accommodate planned giving, balancing growth, income, and risk profiles accordingly.

## **Legal and Estate Planning Integration**

Incorporating philanthropy into legal and estate planning helps preserve wealth for future generations while fulfilling charitable intentions. Tools such as charitable remainder trusts, foundations, and bequests are commonly used to synchronize estate plans with philanthropic goals.

## **Benefits of Synchronizing Philanthropy with Financial Planning**

### **Maximized Charitable Impact**

By coordinating giving with financial planning, donors can increase the effectiveness and sustainability of their philanthropy. Structured giving allows for larger or more strategic contributions that can create long-term benefits for chosen causes.

### **Enhanced Tax Advantages**

Synchrony philanthropic financial planning enables donors to fully utilize tax incentives related to charitable donations, reducing overall tax burdens and increasing disposable income for further giving or investment.

## **Improved Financial Stability**

Planning charitable gifts within the context of overall finances helps maintain liquidity and ensures that philanthropic activities do not compromise personal or organizational financial health.

## **Legacy and Succession Planning**

Philanthropy integrated with estate planning supports legacy creation, allowing donors to leave a lasting impact aligned with their values and family succession strategies.

## **Strategies and Tools for Synchrony Philanthropic Financial Planning**

### **Donor-Advised Funds (DAFs)**

Donor-advised funds offer a flexible and tax-efficient vehicle for charitable giving. Donors contribute assets to the fund, receive immediate tax benefits, and recommend grants to charities over time, aligning giving with financial and philanthropic goals.

### **Charitable Trusts**

Charitable remainder trusts and charitable lead trusts are sophisticated tools that provide income streams to donors or beneficiaries while supporting charitable causes. These trusts can optimize tax benefits and support wealth transfer objectives in synchrony with philanthropy.

### **Direct Giving and Bequests**

Direct contributions and planned bequests remain fundamental methods of philanthropy. When incorporated into a comprehensive financial plan, these actions can be timed and structured to maximize impact and tax efficiency.

### **Philanthropic Investment Portfolios**

Some donors choose to create investment portfolios dedicated to philanthropic capital, balancing risk and return with the goal of funding charitable activities sustainably.

### **Regular Review and Adjustment**

Ongoing evaluation of philanthropic financial plans ensures adaptive responses to changes in tax laws, financial markets, and personal circumstances, maintaining synchrony over time.

## **Challenges and Considerations in Philanthropic Financial Planning**

## **Complexity of Coordination**

Integrating philanthropy with financial planning requires expertise across multiple disciplines, including tax law, investment management, and legal structuring. This complexity can pose challenges to effective synchrony.

## **Changing Tax Laws and Regulations**

Tax policies affecting charitable giving frequently change, necessitating continuous monitoring and adaptation of philanthropic financial plans to preserve benefits and compliance.

## **Balancing Immediate Needs with Long-Term Goals**

Donors must carefully balance the desire for immediate charitable impact with long-term financial sustainability, which can sometimes create conflicting priorities within the synchrony planning process.

## **Emotional and Family Dynamics**

Philanthropic decisions often involve emotional considerations and family dynamics that require sensitive handling to ensure consensus and alignment with financial plans.

## **Ensuring Transparency and Accountability**

Maintaining clear records and transparent processes is essential to uphold trust and effectiveness in philanthropic financial planning, particularly when managing significant assets or involving multiple stakeholders.

- Set clear philanthropic and financial goals
- Leverage tax-efficient giving vehicles
- Integrate estate planning with charitable objectives
- Maintain liquidity for both giving and financial needs
- Regularly review and adjust plans to reflect changes

## **Frequently Asked Questions**

### **What is Synchrony Philanthropic Financial Planning?**

Synchrony Philanthropic Financial Planning is a service that combines traditional financial planning with strategies to maximize charitable giving and philanthropic impact.

## **How does Synchrony integrate philanthropy into financial planning?**

Synchrony integrates philanthropy by helping clients align their financial goals with their charitable values, creating tailored plans that optimize tax benefits and maximize donations.

## **Who can benefit from Synchrony Philanthropic Financial Planning?**

High-net-worth individuals, families, and organizations looking to strategically manage their wealth while supporting charitable causes can benefit from Synchrony Philanthropic Financial Planning.

## **What are the key features of Synchrony's philanthropic financial planning services?**

Key features include customized giving strategies, tax-efficient donation methods, impact measurement tools, and ongoing plan adjustments to meet both financial and philanthropic goals.

## **How does Synchrony help maximize tax advantages in charitable giving?**

Synchrony helps clients utilize tax-advantaged vehicles such as donor-advised funds, charitable trusts, and tax deductions to enhance the financial efficiency of their philanthropy.

## **Can Synchrony Philanthropic Financial Planning assist with legacy planning?**

Yes, Synchrony offers legacy planning services that ensure clients' philanthropic intentions are preserved and integrated into their estate plans for future generations.

## **What role does impact measurement play in Synchrony's philanthropic planning?**

Synchrony emphasizes impact measurement to help clients understand and track the social and environmental outcomes of their charitable contributions.

## **How does Synchrony tailor philanthropic strategies to individual client values?**

Synchrony conducts in-depth consultations to understand clients' personal values and charitable interests, designing financial plans that reflect those priorities.

# Additional Resources

## 1. *Synchrony in Philanthropic Finance: Aligning Values with Impact*

This book explores the concept of synchrony in philanthropic financial planning, emphasizing how aligning donors' values with their financial strategies can maximize social impact. It provides practical frameworks for integrating personal beliefs with effective giving. Readers will find case studies and tools to help create synchronized philanthropic plans that resonate deeply with their missions.

## 2. *The Art of Synchrony: Coordinated Giving and Financial Strategy*

Focusing on the art of timing and coordination, this book delves into strategies that ensure philanthropic efforts and financial planning work hand in hand. It discusses how to optimize donation timing, tax benefits, and investment planning to amplify charitable outcomes. The author also highlights the importance of collaboration among stakeholders for synchronized giving.

## 3. *Financial Harmony: Building Sustainable Philanthropic Models*

This title addresses the creation of sustainable philanthropic models through harmonized financial planning. It offers insights into balancing immediate giving with long-term endowment growth and impact investing. Readers will learn how to craft financial plans that support ongoing charitable efforts without compromising fiscal responsibility.

## 4. *Synchronizing Wealth and Purpose: A Guide to Philanthropic Financial Planning*

This guidebook provides step-by-step methods for aligning wealth management with philanthropic goals. It covers estate planning, charitable trusts, and donor-advised funds with a focus on creating synergy between financial assets and giving objectives. The book is ideal for individuals and advisors seeking integrated approaches to philanthropy.

## 5. *Impact by Design: Synchrony in Strategic Philanthropy*

Impact by Design presents techniques for designing philanthropic strategies that synchronize financial resources with measurable social outcomes. The author emphasizes data-driven decision making and the role of financial planning in enhancing program effectiveness. This resource is valuable for both donors and nonprofit leaders aiming for strategic impact.

## 6. *Philanthropic Synchrony: Coordinating Financial Planning for Maximum Good*

This book examines the coordination of various financial instruments to support philanthropic goals efficiently. It highlights tax strategies, timing of grants, and portfolio management as key components of synchronized giving. Readers will gain a comprehensive understanding of how to manage finances in a way that maximizes charitable benefits.

## 7. *Aligned Giving: Syncing Financial Planning with Social Change*

Aligned Giving explores how to ensure philanthropic financial plans are closely linked with desired social change outcomes. It discusses metrics, feedback loops, and adaptive financial strategies that keep giving aligned with evolving community needs. The book is a practical resource for those committed to impactful and responsive philanthropy.

## 8. *The Synchrony Blueprint: Integrating Finance and Philanthropy*

This blueprint offers a detailed framework for integrating personal or organizational finance with philanthropic initiatives. It covers budgeting, investment, tax considerations, and grantmaking in a unified approach. The book serves as a roadmap for achieving coherence and efficiency in philanthropic financial planning.

## 9. *Strategic Synchrony: Financial Planning for Philanthropic Excellence*

Focusing on excellence in philanthropic financial planning, this book outlines strategies to align resources, timing, and goals for superior impact. It includes insights on collaborative giving, legacy planning, and the use of technology to synchronize efforts. Aimed at high-net-worth individuals and foundations, it provides advanced tools for refined giving strategies.

## **Synchrony Philanthropic Financial Planning**

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Damen, Niki Nicastro McCuistion, 2009-12-09 Discover gender-specific tools and strategies Boom-Generation women can use to make philanthropic and charitable decisions Answering women's questions of how and why to give from the heart, *Women, Wealth & Giving* helps you understand the models that work best for charitable giving and how these models fit into your legacy mission, whether you've earned, inherited or married into your wealth. *Women, Wealth & Giving* will help you understand what models work best for charitable giving, and how to fit those models into your plans, mission, and intended legacy-whether you earned, inherited or married into wealth. This useful planning guide also Includes pertinent anecdotes, worksheets, quizzes, inspirational profiles, a resource guide, and much more Identifies gender-specific tools and strategies Boom-Generation women can use to make philanthropic and charitable decisions Provides women the means to engage their hearts as well as their minds in giving money, time, and talent away in meaningful ways With over 43 million Boom-Generation Women at or nearing the age of retirement, the American population is reaching what has been described as the great wealth transfer, and with women outliving men, or choosing to live alone, the role of women in decisions concerning philanthropic dollars will be critical to the economic, political and moral fabric of our society. Get *Women, Wealth & Giving* and discover the transformative power of women's philanthropy.

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**synchrony philanthropic financial planning:** *Inspired Philanthropy* Tracy Gary, 2008-11-03 This newest edition of the classic book shows how anyone can align and integrate values, passions, and dreams for their communities and families into their plans. *Inspired Philanthropy* explains how to make a difference by creating giving and legacy plans, tells what questions to ask nonprofits, and spells out how to help partner with advisors and nonprofit leaders for inspired outcomes. In addition to overall updates to statistics, the new edition includes a discussion of the implications of the Buffett gift to the Gates Foundation; new legacy planning tools; expanded



resources on youth, giving circles, and communities of color; key questions for advisors and donors; and worksheets and resources available on the enclosed CD.

**synchrony philanthropic financial planning: The Philanthropic Mindset: How to Give Smart and Live Rich** Adella Pasos, 2023-01-23 Unlock the secrets to giving smarter and living richer with 'The Philanthropic Mindset.' This groundbreaking book shows you how to align your values with your giving, and teaches you how to make the most impact with your philanthropy. This book written by business expert, Adella Pasos, Discover how to create a philanthropic plan that fits your lifestyle, and learn how to give in a way that brings joy and fulfillment to both you and the recipients of your generosity. 'The Philanthropic Mindset' is the ultimate guide to making a difference while living the life you want. Grab your copy of this book today! You will learn the following: How to align your values with your giving in order to make the most impact. Techniques for creating a philanthropic plan that fits your lifestyle and goals. Strategies for giving smarter, rather than just giving more. How to evaluate the effectiveness of different charitable organizations and causes. Ways to measure and track the impact of your philanthropy. The benefits of involving your family and community in your giving. How to give in a way that brings joy and fulfillment to both you and the recipients of your generosity. The importance of balancing short-term and long-term goals in philanthropy. Ideas for leveraging your resources, including time, money, and connections, for maximum impact. How to make a difference in the world while also living the life you want.

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**synchrony philanthropic financial planning: Solving the Giving Pledge Bottleneck** Sean Davis, 2021 This book highlights the historic inflection point we are in, both in terms of philanthropy in general, and specifically in financing the solutions to our largest and most urgent social and environmental problems. It covers the two movements that have recently had a dramatic influence on capitalism. First, wealthy millennials have been pressuring their bankers to invest their family portfolios in companies with high social and environmental impact (ESG ratings), triggering a wave where the wealth management industry, and now all public companies, are significantly adapting to the increasing demand for good. Second, The Giving Pledge triggered another wave, changing what success and the accumulation of wealth means. It has even begun to redefine the goal of capitalism as more than 200 billionaires have pledged to give half or more of their wealth away. This book also focuses on the bottleneck problem that The Giving Pledge has created, as it is very hard to give hundreds of billions away with measurable impact to nonprofits lacking detailed long-term plans to scale. Nonprofits have never had the luxury of having all the resources to invest in the planning, management training and systems needed to rapidly expand. Thus taking in very large gifts is very difficult, and almost impossible to justify. Large philanthropy can always be used for traditional

capital campaigns and to fund endowments, yet The Giving Pledge signers are often looking for large visible impact beyond these traditional avenues. The result is a bottleneck which has grown as more billionaires pledge their funds away while their wealth continues to skyrocket and giving rates stay very small. Finally, this book covers the emergence of large giving vehicles, modelled after the private equity industry. They have sophisticated third-party managers focused on deploying funds and supporting management teams. It also covers the scaling of nonprofits in a significant way (Big Bets) as well as investing large philanthropy through for-profits as Program Related Investments (PRI) at scale. This book is of interest specifically to nonprofit and foundation leaders, as well as wealth managers, estate attorneys and other philanthropic advisors. It is also of interest to investors and corporate CEOs as they begin to access these large pools for philanthropic capital to increase their impact. This book is focused on providing those with the ability to make large philanthropic investments a path to scale their impact and increase their fulfillment and that of their family. It provides a step-by-step guide of how these approaches, especially PRI at scale, can actually solve the social and environmental challenges that have been seemingly hopeless. Sean Davis is the Founder and CEO of Merton Capital Partners. He started his career with J.P. Morgan in New York and then joined Advent International, a leader in international private equity, helping to develop its office in Brazil. Mr. Davis then joined Saratoga Partners in New York and was dedicated to leverage buyout opportunities and restructurings. He was recently the Development Director for The Salvation Army of Palm Beach County, where he was focused on creating a bold growth plan to solve the problem that almost half the children in the County fail to read a third grade level. He was also responsible for managing their housing strategy. Mr. Davis graduated from The Edmund A. Walsh School of Foreign Service at Georgetown University and has an MBA from the London Business School where as a student he co-founded the LBS Private Equity Conference and The LBS Collier Institute of Private Equity. He is also an Adjunct Professor at Palm Beach Atlantic University's Masters in Global Development and an advisor to various nonprofits.

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**synchrony philanthropic financial planning: Creating a Private Foundation** Roger D. Silk, James W. Lintott, 2003-06-01 Imagine all you'd like to accomplish with your philanthropy. Now picture a large portion of your resources never reaching their intended use due to poor strategies, mismanagement, or unnecessary taxes. Today the opportunities in the philanthropic sector are greater and more varied than ever. Private foundations, which offer several estate and tax-planning advantages as well as unparalleled donor control, have become the vehicle of choice for more than sixty thousand individuals and families--and may be ideal for you. Creating a Private Foundation introduces the issues you need to understand and gives the big picture on how foundations work. It tells you exactly what is involved for you, for the causes you care about, for your finances and taxes, and for your heirs. Chapters address the practicalities as well as the implications of founding,

funding, organizing, and operating an effective foundation, including growing its endowment, allocating its assets, and selecting professional foundation management help. Roger Silk, James Lintott, and their colleagues, leaders in the foundation consulting arena, have pooled their wisdom in this comprehensive guide for donors and your advisers. If you're looking to make a difference, there is no better guide.

**synchrony philanthropic financial planning: Mapping the New World of American Philanthropy** Susan U. Raymond, Mary Beth Martin, Esq., 2007-07-10 Praise for Mapping the New World of American Philanthropy Causes and Consequences of the Transfer of Wealth This book does a wonderful job of guiding the reader through the increasingly changing world of philanthropy. These changes must drive dramatic change in the not-for-profit sector if it is to respond efficiently and effectively. Only then will we be able to maintain the quality of our society. --Thomas J. Moran, Chairman, President, and CEO of Mutual of America The Great Wealth Transfer has been a mantra for years for fundraisers and donors alike. What does it really mean? Susan Raymond and Mary Beth Martin bring rigorous analysis and profound insights to the phenomenon in this book, which provides the definitive map for navigating a brave new world of philanthropy. --Fiona K. Hodgson, Vice President for Leadership Giving, Save the Children The anticipated transfer of wealth between generations--and its practical implications for philanthropy--is the subject of much interest in the nonprofit community. Edited by noted nonprofit experts Susan Raymond and Mary Beth Martin, Mapping the New World of American Philanthropy offers candid, insightful essays that offer an insider's look at every angle of wealth transfer, with contributions by leaders in the field of philanthropy, including: \* Marc H. Morial \* Preston H. Koster \* Steven DiSalvo \* Nora Campbell Wood \* Rodney W. Nichols With hard-to-find data, graphs, and charts, as well as other practical tools, Mapping the New World of American Philanthropy is your seminal guide to prepare for the coming intergenerational transfer of wealth that will affect your nonprofit and?philanthropy in general. Get practical insights and strategies from the most experienced wealth transfer leaders and practitioners in America.

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