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.

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