



Client Profile

The Excellence in Giving “Bullseye” Client Profile

Our services are targeted to families and individuals who fit the following criteria:

1. Business owner or executive with significant demands on time.
2. Widows, widowers, and heirs particularly those whose spouse or parent made most of the charitable giving decisions.
3. Frustration with responding to incoming requests for charitable gifts.
4. Desire and capacity to give \$500,000+ annually from current income and/or assets.
5. Actively deciding how to raise their standard of giving rather than their standard of living.
6. Families who desire to train the next generation and increase communication within their family about giving.
7. Values information from recipients about specific measurable outcomes from gifts.



Excellence in Giving
the joy of generosity

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