

Coordinated Professional Services for Philanthropy

Donors and trustees rely on their professional advisors for an array of resources, guidance, and services to achieve their philanthropic goals. GMA works with other professional advisors to coordinate services on behalf of our shared clients.

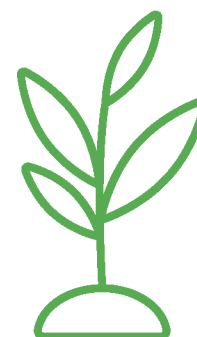
GMA Foundations offers customized levels of its comprehensive services to foundations and giving programs, and is a philanthropy resource to investment, audit, and legal professionals.

Financial Management

- Outsourced CFO
- Internal controls and procedures
- Compliance monitoring
- Accounting
- Financial statements preparation
- Tax preparation; 990, 990PF
- Budgeting
- Payout analysis
- Full-service bookkeeping

Governance

- Start-up advice
- Mission, purpose, goals
- Policies, structure
- Compliance
- Strategic planning
- Trustee training and succession
- Facilitation of meetings and retreats
- Donor legacy, family engagement



Grantmaking

- Strategy, guidelines, programs
- Grants management
- Online grant cycle
- Nonprofit due diligence
- International grants
- Evaluation
- Pooled giving
- Research, learning engagement

Coordination with other professionals on behalf of our clients:

Audit and accounting

Investment

Legal



Foundations and Giving Programs

General Administration

- Point of contact
- Meeting Planning
- Record-keeping
- Website services
- Grants database management

Networked Giving

- Funder community
- Relationship-building
- Policy lens
- Movement building



GMA provides strategic guidance and customized professional services to private foundations and philanthropic families, individuals, and companies. A dedicated team at GMA supports each of our clients in their philanthropy, at the level they choose.