

TRUSTBRIDGE GLOBAL FOUNDATION®

Investing Private Foundation Assets

International Giving Solution

A Structured Approach for Mission-Related Investing Across Borders

Private foundations often seek to align more of their capital with their charitable mission. Mission-Related Investing allows foundations to deploy assets in ways that support their charitable purpose while pursuing long-term financial sustainability.

However, cross-border activity is rarely simple. Regulatory restrictions, cross-border tax considerations, and administrative complexity can make international Mission-Related Investing difficult to execute efficiently.

TrustBridge Global Foundation provides a Swiss-based shared charitable structure through a Donor-Advised Fund. This structure enables foundations to deploy capital globally for Mission-Related Investing and other charitable purposes—compliantly, efficiently, and without expanding internal infrastructure.

Through this approach, foundations retain advisory input on charitable intent. TrustBridge provides governance oversight, compliance management, and operational execution within its regulated charitable framework.

The Challenge Facing Private Foundations

Moving charitable capital across borders involves more than good intentions. Foundations may encounter:

Regulatory Constraints

Different jurisdictions apply different rules to cross-border and Mission-Related Investing activities. Even where activity is permitted, compliance can require specialized structuring and ongoing oversight.

Cross-Border Structural Friction

Taxes may apply when funds move internationally. Intermediary fees and differing tax treatments can reduce the amount ultimately available for charitable purposes. Over time, these factors may limit long-term impact.

Administrative Burden

A direct cross-border approach often requires:

- Multi-jurisdiction legal structuring
- Anti-Money Laundering/Know Your Customer (AML/KYC) and sanctions compliance
- Due diligence and eligibility verification
- Banking coordination and settlement
- Ongoing monitoring, reporting, and audit management

For many foundations, these responsibilities are non-core and resource-intensive, diverting time and attention from strategic priorities.

The TrustBridge Solution: A Shared Global Charitable Structure

TrustBridge Global Foundation features the Foundation Fund, a Swiss-based Donor-Advised Fund designed to support cross-border Mission-Related Investing and philanthropic deployment of private foundation assets. The Foundation Fund serves as a shared charitable structure that allows private foundations to utilize TrustBridge's framework to facilitate Mission-Related Investing and international philanthropic activity.

Through this structure, foundations can deploy assets across borders within a regulated and well-governed environment, without creating separate legal entities or expanding internal compliance infrastructure.

Each Foundation Fund:

- Operates under Swiss charitable regulations through TrustBridge's foundation governance
- Enables cross-border deployment of private foundation assets for charitable purposes
- Maintains defined fiduciary oversight and decision-making authority
- Provides compliance, due diligence, and operational support
- Preserves alignment with the foundation's charitable intent



How Foundations Use the Foundation Fund Structure

Navigating Regulatory Constraints

A foundation encountering legal complexity in cross-border philanthropic activity utilizes TrustBridge's structure to facilitate compliant international deployment aligned with its charitable objectives.

Expanding International Reach

Rather than creating separate legal entities abroad, a foundation uses TrustBridge to centralize compliance, documentation, and settlement execution.

Seeking Operational Relief

Foundations seeking international engagement without expanding internal compliance capacity may delegate due diligence, screening, and banking coordination to TrustBridge while maintaining strategic oversight.

In each case, TrustBridge supports foundations and their advisors in deploying private foundation assets responsibly for charitable purposes.

How the TrustBridge Foundation Fund Supports Philanthropic Deployment

A TrustBridge Foundation Fund operates within the governance and regulatory framework of TrustBridge. Through this structure, private foundation assets can be deployed internationally for charitable purposes within a defined and well-governed environment. The comparison below illustrates how the TrustBridge Foundation Fund structure differs from a direct cross-border approach.

Direct Cross-Border Deployment vs. TrustBridge Foundation Fund

Structural Area	Direct Cross-Border Approach	The Foundation Fund Approach
Charitable Structure	Private Foundation operates independently and may require separate legal arrangements in each jurisdiction	Activity conducted within an established Swiss charitable foundation
Cross-Border Execution	Private foundation coordinates international activity directly across multiple jurisdictions	Cross-border philanthropic deployment facilitated within a centralized Swiss charitable framework
Compliance & Risk Management	Foundations must manage both domestic compliance requirements and cross-border due diligence. In some jurisdictions this includes procedures such as expenditure responsibility or equivalency determinations for international grants, which can be complex and resource-intensive.	Documented AML/KYC procedures, sanctions screening, and risk-based due diligence managed within the Foundation Fund structure
Operational Controls	Independent banking coordination and settlement execution	Structured banking execution and defined operational controls
Audit & Transparency	Separate audit, reporting, and regulatory oversight	Governance, oversight, and annual independent audit managed centrally
Global Reach & Stability	Cross-border activity depends on local partnerships and jurisdictional capacity	Operates within Switzerland's stable legal framework and an established international philanthropic network

Benefits for Private Foundations

The TrustBridge Foundation Fund structure delivers practical advantages:

Capital Efficiency

Reduces structural leakage so more capital supports charitable objectives.

Operational Simplicity

Avoids building parallel legal and compliance systems across jurisdictions.

Regulatory Navigation

Operates within an established Swiss charitable framework when domestic law limits or complicates certain cross-border approaches.

Mission-Related Investing Approaches Supported

TrustBridge facilitates a range of cross-border charitable deployment strategies within its governing framework:

- **Mission-Related Investing Deployment** – Charitable structures that align capital use with foundation values and objectives, subject to internal review and applicable law
- **Complementary Grantmaking** – In some cases, foundations may also utilize cross-border grantmaking alongside Mission-Related Investing strategies.

Begin the Conversation

If your foundation is exploring ways to deploy private foundation assets across borders, connect with our team to explore alignment, structure, and next steps within a regulated and well-governed framework.

Get in touch with us at info@trustbridgeglobal.com

Risk Mitigation

Benefits from Swiss-based governance oversight, documented AML/KYC procedures, sanctions screening, independent audit, and defined escalation protocols.

Is this approach appropriate for your foundation?

This Foundation Fund approach may be appropriate if your foundation:

- Faces legal or regulatory constraints on cross-border philanthropic activity
- Seeks international reach without establishing new entities
- Aims to reduce compliance and administrative burden
- Prefers to operate within a regulated charitable framework

TrustBridge works alongside foundations and their advisors to assess alignment with governance responsibilities and philanthropic objectives.

Legal Disclaimer (Charitable Status and No Financial Services)

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