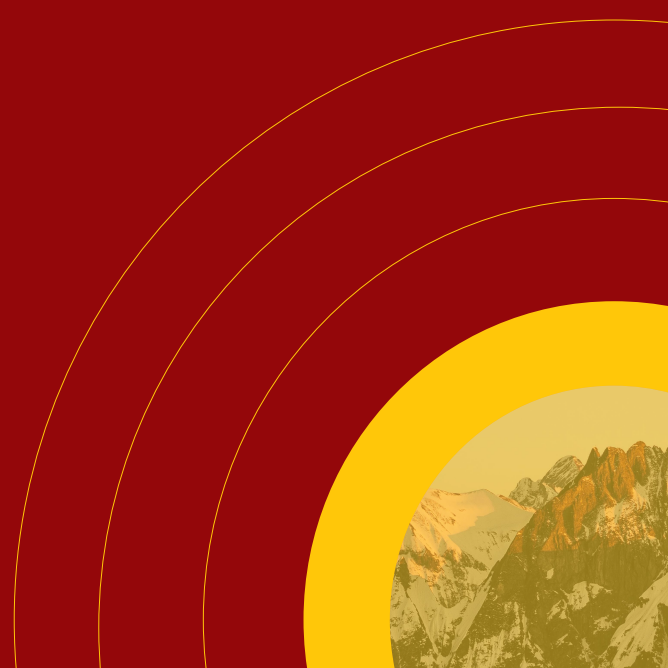


# Making Global Giving Easy

Save Money | Save Time | Reduce Risk



# Making Global Giving Easy

Giving directly to international charities is often wise you make the most out of your giving and directly reach the communities you want to help.

But sometimes you feel like you're wasting time and money trying, or worse, putting yourself or your foundation at risk

So the gift doesn't get made.

**We get it.** We understand—and we have a plan to help you get where you want to go.



## What We Do

**TrustBridge believes global giving** should be easy so that resources can flow to the areas of the world that need it the most.

Our vision for givers everywhere is to provide an easy way to make donations to any charity in the world at low cost. We send grants through our global network of foundations for maximum efficiency and convenience.

### For Charities

At TrustBridge, we want to remove any barriers preventing charities from receiving donations from almost anybody, anywhere in the world. Our offer is to make it easy to go global in your fundraising, so you can focus on your mission.

**TrustBridge offers a safe, easy and efficient method for making tax-deductible gifts to charities in other countries.**



We searched for a reliable and cost-effective way to process donations from our US supporters for years. Now, after almost a decade of relying on TrustBridge's services I cannot fathom how we did life before! The professionalism, timeliness, and customer support make our international transactions smooth and efficient.

**- Andrzej Turkanik**  
Director of Quo Vadis Institute

# Our Global Network

TrustBridge is developing a growing network of like-minded charities and foundations in countries all over the world.



## Our Network Members



As our network grows, our ability to give **effectively** and **efficiently** grows as well.

# Your Benefits



### Easy

Contact TrustBridge staff and we take care of everything.



### Fast

Once a charity is approved, it's not unusual for grants to take just a couple of days.



### Cost Effective

TrustBridge grant costs are typically only 1%, subject to a \$300 minimum assessment.



### Compliance

TrustBridge's experienced staff deals with home country compliance, receiving country compliance and banking compliance.



### Confidential & Private

Give anonymously if you like, and everything is confidential.



### Tax Deductible

For many countries, you can receive a home country tax deduction for your international giving.



### Safe & Secure

You benefit from Swiss economic and political stability, and Swiss banking.



### Global & borderless

Give (and make impact investments) effectively and efficiently all over the world.

# Who We Are

An exceptional group of experienced professionals that brings together world class expertise in finance and cross-border giving. Our team includes bankers, tax specialists, legal experts and philanthropy advisors who are passionate about serving your needs. We have strategic partnerships with leading global banks and technology providers to deliver a seamless end-to-end philanthropy solution.

## Robert Collins

For the past 15 years, Robert has served with the National Christian Foundation, an organization that has facilitated over \$10 billion in charitable giving in the U.S. to more than 65,000 charities in over 100 countries. Prior to that, he was Managing Director and Co-Chief Investment Officer of Goldman Sachs (Equity Investment Management) where he led a 54-person team responsible for investing \$36 billion in European and Global equities portfolios.

## Tricia Collins

Tricia is a licensed clinical social worker with extensive operational experience in the healthcare and non-profit sectors. Previously, she was the Director of Operations for National Christian Foundation Tampa Bay and was the Clinical Coordinator for Social Work at Johns Hopkins All Children's. Tricia has been with TrustBridge since its inception and continues to be passionate about helping donors and charities mobilize resources for every good work.

## Paul Bolte

Paul Bolte brings to TrustBridge his entrepreneurial background, strong people, systems, and number skills. For the past 11 years, he was the CEO of Bartercard New Zealand and the Founder, President & CEO of Bartercard USA. Paul is a past Chairman of the Global Board of Directors for the International Reciprocal Trade Association and a member of the C12 Group, a network of Christian CEOs and executives working to integrate faith and business.

## Jim Rich

Born in Ecuador, Jim has an extensive background working with international charities, funding organizations, and high net worth families. With deep, hands-on experience managing grants and programs across Asia, Jim's background in international granting-making includes work with Unicef, the World Food Program, and many other international agencies. Jim has an MBA from the University of Georgia and most recently worked for the National Christian Foundation for nine years during which time over \$10 billion was distributed to charities.

## Tony Gerena

Prior to TrustBridge, Tony spent 20 years working in healthcare information technology. He started his career as a software engineer on a team that built the first web-based Electronic Health Record platform. Recently he served as SVP of Technology at SPH Analytics and Director of Engineering at Experity Health where he managed 30+ software engineers.

## Adrian Pust

Adrian is a Swiss Certified Public Accountant and former EY manager with a background spanning corporate finance, entrepreneurship, and philanthropy. He holds executive roles in several nonprofit and cooperative organizations, including Stiftung Antioch, Landeskirchliche Gemeinschaft Jahu, Prosperita, and Schulkooperative Biel.

TRUSTBRIDGE GLOBAL STAFF



## Iniego Varon

Iniego is a seasoned lawyer with over a decade of experience. Prior to joining TrustBridge, Iniego served as Head of Legal of several companies overseeing multi-country legal affairs and cross-border transactions. He also served as legal counsel for non-profit organizations advocating community development in underserved areas. An award winning legal professional, Iniego hopes to serve non-profit organizations around the world through Trustbridge.



## Carl Thong

Carl is founder and CEO of Sunstone Group, a holding company with businesses in various fields. In addition, Carl is often engaged as a strategy consultant by multinational corporations, NGOs and government organizations.



## Daryl Heald

Daryl has been involved in the global generosity movement since its inception, and is the founder of Generosity Path. He has served on for-profit and not-for-profit boards, is a philanthropy advisor to ultra-high net worth families, and invests in private equity with an emphasis on social impact.



## David Wills

David has been with The National Christian Foundation since 1998 and serves as President emeritus. He also serves on the boards of Generous Giving, The Evangelical Council for Financial Accountability (ECFA), ProVision Foundation, Global Generosity, Barnhart Crane & Rigging, and iDonate.



## Marissa Maren

As a leader at Busana Apparel Group, Marissa develops new business opportunities and drives corporate strategy. Prior to working with Busana Apparel Group in Jakarta, Marissa worked in Barclays Capital's investment banking division in New York.



## Nicola Johnson

Nicola has led major donor activities since 2010 and oversees £130m in charitable funds each year. Nicola is part of the senior Leadership Team at Stewardship, and together with her team, she seeks to serve generous philanthropists with expertise and authenticity.



## Paul Lenoir

Paul is active in TrustBridge's development efforts in Europe, and specializes in trust and accountability issues with several European Global Trust Partners. He serves on the Board of Stiftung Ehrenkodex in Switzerland, is trained in Swiss banking, and spent over 40 years in IT and business process outsourcing.



## Adriel Jost

Adriel Jost is an economist, consultant and speaker. He is a Fellow at the Institute for Swiss Economic Policy at the University of Lucerne (IWP) and President of the think tank Liberethica.



## Marc Baumann

Marc Bauman is a lawyer, an economist, and a finance expert. He is CEO of Invethos AG, an asset management firm based in Switzerland. He is member of the board of several companies and charitable foundations in Switzerland.

TRUSTBRIDGE GLOBAL BOARD MEMBERS

# Solutions For Your Giving

## Your Foundation Fund

A Foundation Fund is the premier donor-advised fund (DAF) from TrustBridge Global offering donors an international platform for charitable giving from a trusted Swiss host.

With a Foundation Fund, you can navigate the complex international banking system and laws and avoid the expensive transactions and endless red tape that would leave your generosity stranded at the border. You can see your grants flow safely, quickly, and affordably to wherever you want your giving journey to go.

Whether you are looking for grant-making flexibility, charitable asset protection, excellent service, or the simplicity of managing your philanthropy from one place, the Foundation Fund is your perfect global giving solution. Generosity on a global scale requires expertise and a great team. With administrative hassles out of the way, you can stay focused on the most important aspects of giving: making an impact, receiving joy, and improving lives all around the world.



### Domestic Or International Grants

When you are ready to send money to a charity, it's easy to follow these steps:

1. Contact our team and tell us where you want your grant to go. We'll contact the charity, confirm their legal status, verify their bank accounts, manage all compliance and legal regulations, and ensure they are equipped to handle the donation.
2. When your charity is approved, you can give by transferring money from your bank, by using your Foundation Fund, or a Fund managed by a member of our extensive global network.
3. TrustBridge handles the rest; ensuring your charity safely receives the grant in their local bank account. Grant assessments are typically only 1%, subject to a CHF300 minimum.

### Protect Your Charitable Assets In Switzerland

At TrustBridge, we know that you want to be wise in stewarding your charitable assets. In order to do that, you need a safe and easy vehicle for preserving assets and making gifts to charities you care about in your community and around the world.

The same reasons that motivated our team of global experts to build our platform in Switzerland make it a strong charitable asset protection solution for many large foundations and individual donors.

## Our Promise To You

- A team of seasoned professionals assigned to you from around the world
- The ability to make grants to almost any charity, anywhere
- Absolute protection of your family's privacy
- Security and safety for your assets



## Common Questions:

### Who can open a Foundation Fund?

A Foundation Fund is a perfect giving solution for individuals, private foundations, families, companies, and even charitable organizations. A donor-advised fund can be a flexible part of many giving solutions.

### How much does it cost?

TrustBridge shares the cost of operations proportionally among its donors. It collects an annual administrative assessment of only 30 basis points (0.3%) per year (charged monthly based on the average daily balance). Other costs vary based on investment selections and unique administrative services provided.

### How do I give to my Foundation Fund?

You can contribute liquid currencies, appreciated assets like stock or real estate, or other valuable assets. Let our experts help you maximize your giving. Even if you are a dual-country taxpayer or have tax obligations in many countries, we can help you send more to charity and less to taxes.

### What investment options can I recommend for my DAF balance?

Several time duration options exist and custom investment options can also be accommodated including exposure to multiple international exchanges.

### Can I transfer an existing balance?

Yes, DAF or private foundation assets in many countries can easily be moved to your Foundation Fund.

# How A World-Leading Grant Maker Uses Trustbridge Global Foundation

## About The Maclellan Foundation

The purpose of the Maclellan Foundation is to provide financial and leadership resources to foster biblical Christian values in the community and meet practical and spiritual needs. This is primarily accomplished through faith-based ministries. On a national basis, the foundation's vision is to see strong families worshipping in healthy churches, influencing culture, and seeking to serve God above all else.

## Maclellan's Situation

- Some of Maclellan's projects are in closed countries that Maclellan couldn't reach.
- Some grants cost unreasonable amounts in fees.
- Some providers offered less personal touch and set a lower bar for customer service.
- When making some technically challenging grants, Maclellan wanted another set of eyes to provide legal assurance but didn't know where to turn.
- In one instance, the best way to serve a grantee in Europe was through a loan rather than a direct grant. Maclellan knew that was the right answer but did not know how to execute.

**TrustBridge** has helped solve all these issues for Maclellan.

"Now I prefer them to any other service... If I want to have the utmost confidence in a complicated grant, I send it their way."

- Cathy Cates

Director of Operations, Maclellan Foundation

Maclellan often funds groups that do not have access to traditional Western funding. They are hard to find and hard to fund. TrustBridge makes that possible.

- David Denmark  
Executive Director,  
Maclellan Foundation

## How Trustbridge Helps

1. Unrivaled Global Expertise
2. Flawless Execution
3. Demonstrated Integrity
4. Unbeatable Price
5. We-never-thought-of-that Creativity
6. Personal Service

**TrustBridge** is giving local organizations an opportunity to connect with others beyond our own network so that we can work together more effectively and efficiently towards helping more people with a higher purpose.

Thankful for TrustBridge!

- Ghie Simbayan  
SIM PH Country Director

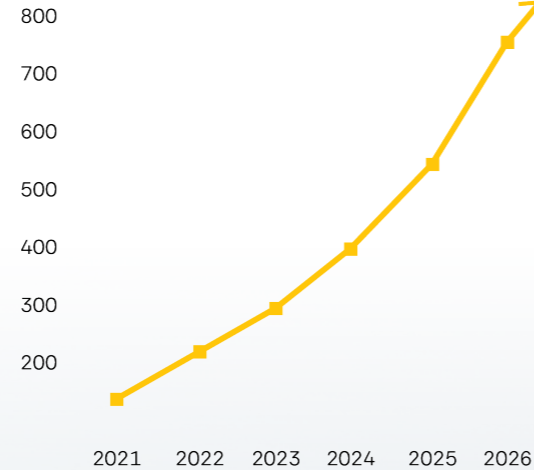
*Maclellan*



# Growing Strength

Thousands of charities and givers over the years have trusted us to create pathways for them to extend and open doors for generosity across countries and continents. Here are just a few of the key milestones we've celebrated in recent years.

## SFr 750,000,000+ In Cumulative Grants



TrustBridge is giving local organizations an opportunity to connect with others beyond our own network so that we can work together more effectively and efficiently towards helping more people with a higher purpose.

Thankful for TrustBridge!

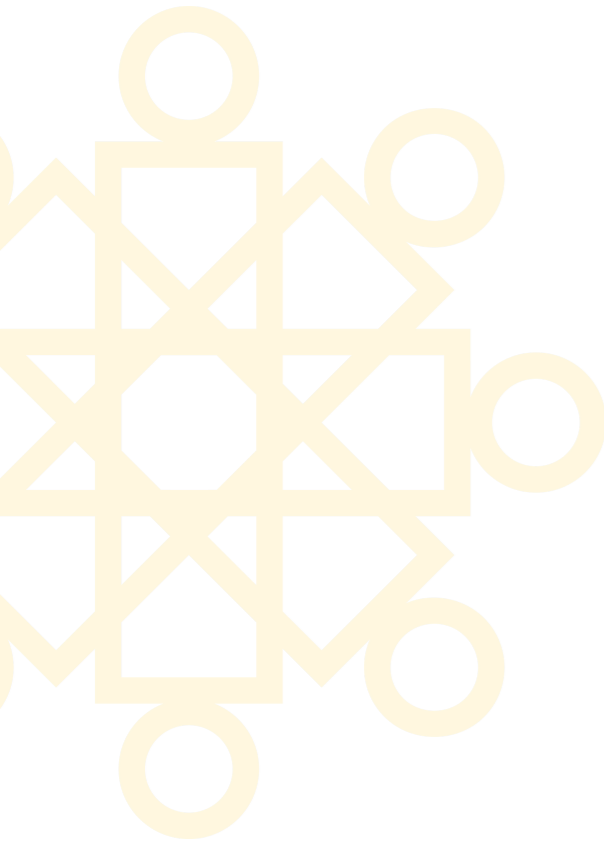
- Ghie Simbayan SIMPH Country Director



**1,500** charities receiving grants yearly, with an average grant of **SFr 50,000**

TrustBridge Global receives contributions and send grants and in dozens of currencies including Swiss franc, U.S. Australian and Canadian dollars, Euro, Pound sterling, Brazilian real, Indian rupee, Indonesian rupiah, South African rand, and many more.

Minimizing currency exchange losses and maximizing the granted amounts is a huge source of value for charities and the donors that support them. Through TrustBridge's system, many charities realize hundreds or thousands of dollars of incremental support.



**“I can’t think of anything I need that TrustBridge isn’t providing.”**

**-Lee Behar, Director of Finance,  
Maclellan Foundation**

# Why We Exist

## Mission

To mobilise resources by making global giving easy. We do this by creating a global network of generous communities.

## Vision

Imagine charities everywhere having all they need to accomplish their mission.

## Our values

- Put people first.
- Trust our people to act.
- Move as fast as possible, but not faster.
- Find a way to say yes.

### Switzerland

Zelglistrasse 10 3608 Thun Switzerland

+41 33 588-0001

### USA

1901 Ulmerton Road, Suite 400 Clearwater, FL 33762

+1 727 502-6022

**TrustBridge has added much value** to our international grant making and program-related investing. By streamlining our processes and performing much needed field due diligence, they’ve not only saved us time, but lowered our costs in the process. I highly recommend TrustBridge.

**David Denmark**  
**Executive Director of Maclellan Foundation**



[www.trustbridgeglobal.com](http://www.trustbridgeglobal.com)