

TRUSTBRIDGE GLOBAL FOUNDATION®

Legacy Planning: A Thoughtful Approach to Family, Wealth, Legacy and Giving

International Giving Solution

Legacy planning often begins with a desire for clarity. As families reflect on the resources they have built, planning naturally expands to include broader considerations—how wealth will support loved ones, how values will be carried forward, how to create and keep harmonious healthy relationships, and how generosity can remain an enduring part of the family legacy.

Assets evolve, families span generations and jurisdictions, and charitable intentions must be balanced alongside legal, tax, and family considerations. When philanthropy is involved—particularly across borders—the complexity increases further.

For many families, the challenge is not intent, but structure. Legacy plans are often built over time, across multiple advisors and documents, making it difficult to coordinate decisions, revisit assumptions, or adapt as circumstances change.

Summary

What This Is

A Foundation Fund legacy planning solution within TrustBridge Global Foundation, using a Donor-Advised Fund structure to integrate charitable giving into legacy planning—providing flexibility, coordination, and continuity over time.

Who This Is For

Global citizen families, donors, and advisors navigating legacy planning decisions, particularly those with charitable intentions, complex assets, or cross-border considerations.

Why It Matters

Traditional legacy planning often becomes fragmented and difficult to adapt as circumstances change. A Foundation Fund provides a unifying charitable structure without the need to create a separate legal entity, helping clarify intent, coordinate planning across advisors and jurisdictions, and support enduring legacy.

Why Legacy Planning Feels Complex Today

Modern legacy planning brings together many moving parts:

- Multiple advisors working across legal, tax, and financial disciplines
- Assets held in different countries and in different forms, including businesses, real estate, and private investments
- Family members living in different jurisdictions
- Charitable goals that extend beyond a single lifetime

Without a structured framework, even well-intentioned plans can feel fragmented—leaving families uncertain where to begin or how to move forward with confidence.

A Foundation Fund Approach to Charitable Legacy Planning

Through a Foundation Fund, TrustBridge Global’s premier Swiss-based Donor-Advised Fund, families can gain a flexible structure that can be incorporated into legacy plans without the need to establish separate legal entities or lock decisions in place prematurely. This structure allows charitable intentions to be clearly articulated today, while remaining adaptable as family circumstances, assets, and priorities evolve.

TrustBridge serves as a coordinating partner, helping families align charitable intent with legacy planning decisions and ensuring that planning remains cohesive over time.

Traditional Legacy Planning vs. a Foundation Fund Approach to Legacy Planning

Traditional Legacy Planning	TrustBridge Foundation Fund Approach
Planning decisions are often made across multiple documents, advisors, and jurisdictions	Foundation Fund provides a unifying structure for charitable legacy planning
Charitable intent may be expressed once and difficult to revisit	Charitable intent can be clarified, revisited, and refined over time
Legacy plans are typically fixed at the time documents are executed	Foundation Fund allows flexibility as family circumstances and priorities evolve
Coordination across legal, tax, and financial advisors can be complex	TrustBridge works alongside advisors to help align planning decisions
Plans may not clearly define how charitable giving continues beyond the donor’s lifetime	Legacy planning is integrated into the charitable framework
Complex or non-cash assets require bespoke planning each time	Foundation Fund offers a consistent structure for integrating complex assets
Global or cross-border considerations add additional complexity	TrustBridge helps coordinate charitable planning across jurisdictions
Donors may feel uncertain where to begin	TrustBridge provides a clear starting point for charitable legacy planning

What a Foundation Fund Enables in Legacy Planning

Integrate Charity into Your Estate and Legacy Plan

A Foundation Fund with TrustBridge allows families to incorporate charitable giving alongside broader legacy planning goals. Within this structure, families can:

- Provide responsibly for loved ones
- Express enduring values
- Create continuity across generations
- Extend generosity beyond a lifetime

By integrating charitable intent into a Foundation Fund, families establish a clear and adaptable framework that supports both legacy planning needs and long-term legacy goals.

Ensure Continuity of Charitable Purpose

Through a Foundation Fund, families can establish how charitable intentions are stewarded over time. This approach allows families to:

- Involve children or grandchildren in charitable decision-making
- Establish long-term charitable priorities
- Provide clarity around how charitable resources are guided across generations

Legacy planning within a Foundation Fund supports legacy giving by creating continuity of purpose, while allowing future generations to engage meaningfully with the family's charitable values.

Structure Charitable Gifts Through the Estate

A Foundation Fund can be named as a beneficiary within legacy planning documents, providing a clear mechanism for funding charitable intentions.

This may include designations through:

- A will or trust
- Retirement accounts
- Life insurance policies

By directing estate assets into a Foundation Fund, charitable resources can be administered in alignment with the family's succession framework, supporting long-term impact with clarity and flexibility.



Plan with Complex and Global Assets

A Foundation Fund provides a flexible structure for charitable planning involving complexity—whether in the form of assets, jurisdictions, or both.

This includes planning with:

- Closely held business interests
- Real estate
- Alternative or private investments
- Assets held across multiple countries
- Beneficiaries residing in different jurisdictions

When assets or families span borders, inheritance, tax, and regulatory considerations often vary. A Foundation Fund supports early planning, flexibility over time, and coordination across advisors and jurisdictions—helping families preserve clarity and legacy across generations.

How TrustBridge Supports Legacy Planning

TrustBridge works alongside your trusted advisors to help ensure charitable intentions are clearly articulated and thoughtfully carried forward by:

- Facilitating conversations around charitable intent and family legacy
- Helping integrate charitable giving with broader estate objectives
- Supporting planning involving real estate, business interests, and other complex assets
- Assisting with charitable succession frameworks that engage future generations
- Coordinating with existing advisors to ensure alignment and continuity

Our experience working with donors across jurisdictions allows us to provide structure, perspective, and long-term guidance—while honoring the role of each advisor involved. Implementation is carried out in coordination with each family's local legal and tax advisors, reflecting applicable laws and jurisdictions.

Start Planning with TrustBridge

If you are unsure where to begin, TrustBridge can help. We work with families and their advisors to clarify charitable intent, explore how a Foundation Fund can fit within a legacy plan, and coordinate next steps with existing legal and tax advisors.

Get in touch with us at info@trustbridgeglobal.com

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