



DAN THOMPSON
PHILANTHROPIC SERVICES

Realizing Your *Opportunity*

We serve families, individuals and organizations with their philanthropic goals. Whether you have a private foundation, a donor advised fund or another vehicle already in place - or whether you are just exploring ways to create a legacy of giving, *we can help*. Our aim is to activate a philanthropic vision that aligns with your personal values, implements professional processes, maintains the highest standards in supporting worthy causes and makes the greatest impact in your community.

Our services are customized to meet client needs and can range from short-term engagement to providing an ongoing presence responsible for managing the grants process at every level. In either case, we work hand in hand with the client, not just offering professional advice but implementing processes and executing the work.

Our Services

Regardless of the stage of development you find yourself, we successfully assist in realizing your philanthropic goals.

We're committed to make your community engagement through philanthropy more fulfilling and effective. Whether you are establishing a new foundation or looking to strengthen your charitable activities already in place, let us help.



Developing

a philanthropic identity and complementary strategic plan



Creating

policy that ensures alignment of donor values and accountability

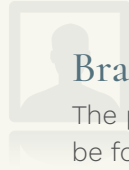


Managing

all aspects of the grant process and providing oversight of outcomes

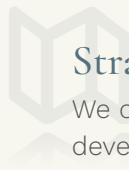
WHAT WE DO:

Values-Based *Planning*



Branding Identity

The primary guide for any foundation should be found in an individualized mission and vision statement. Working with donors and members of the board, we seek to craft these statements based on core values. The mission and vision statement not only communicate your purpose and direction to the community but guide each decision when evaluating organizations you wish to support.



Strategic Planning

We collaborate with your decision makers to develop a comprehensive strategic plan that aligns with your mission and values. We facilitate strategic discussions, conduct analysis, and help define funding priorities and long-term goals.



Principal Support/Board Development

We seek ways to maximize the personal interests and talents of each board member or decision maker so they can be effective and focus on the most satisfying aspects of giving. We strive to fully engage board members, particularly those who represent different generations of the donor family. Work may include board retreats and ongoing counsel and resourcing for members of the board.

WHAT WE DO:

Process Creation *and Grants Management*



Governance & Policy

Development

The successful outcome of charitable giving must be based on sound policies and procedures. We will develop documented practices on leadership structure and operation, roles of board members, grant guidelines, and application requirements in collaboration with the decision makers for unified understanding, transparency and accountability.



Grant Evaluation & Management

We support the identification, evaluation and follow-up of aligned nonprofits who receive grants. Work may include screening and vetting of requests, ensuring IRS compliance of applicants, providing guidance to applicants on the application process, conducting site visits, and proposal evaluation. Our work includes thorough research and due diligence such as assessment of the mission, organizational impact, financial stability, and alignment of shared philanthropic goals.

WHAT WE DO:

Administration *and Oversight*



Grant Monitoring and Compliance

We conduct rigorous follow-up to ensure grants are utilized appropriately and effectively. We monitor the progress of grant recipients, track project milestones, and evaluate the impact of funded initiatives. We also provide compliance oversight to ensure adherence to reporting requirements. Where appropriate we navigate appropriate donor recognition and stewardship.



Administration

We provide structure and consistency to your philanthropic work including organizing, staffing and recording board meetings, maintaining printed and electronic materials, conducting board and grantee correspondence, administering awards and keeping permanent records of grants, as well as implementing post-grant monitoring and evaluation.



Integrated Management

We coordinate with your existing professional advisors including accountants, attorneys, custodians and investment advisors to aid in the compliance with all legal and tax requirements and ensure a fully integrated and coordinated approach. *We do not offer investment management, legal or accounting services.*

Meet Dan Thompson

Dan Thompson possesses three decades of experience working with leading nonprofits and major donors, always aiming to align the philanthropic intent of donors, community stakeholders and nonprofits to advance meaningful philanthropy. Dan is an accomplished professional with demonstrated ability to synthesize and process complex challenges, to develop strategic plans, and employ smart business practices to execute and accomplish key objectives.

Having most recently served as Vice President at the Ascension Saint Thomas Foundation, Thompson was responsible for over \$100M million dollars in assets which were harnessed to provide support to the patients, employees and health system priorities of nine acute care hospitals across Middle Tennessee. Thompson directed the operations, fund development and the philanthropic award process of the foundations.

Thompson's professional experiences have centered on major gift fundraising, strategic planning, management and communications. Prior to Ascension Saint Thomas, Thompson's professional career included establishing a successful fundraising consulting practice which he operated for 10 years. Past experience includes serving as Director of Capital Giving at Belmont University and holding the position of Executive Director of the Tennessee Business Roundtable, as statewide business association. He also played a significant role in each of the statewide fundraising campaigns of his late father, U.S. Senator Fred Thompson.

Thompson holds a bachelor's degree in B.A. from Southern Methodist University and an M.B.A. from Belmont University. Dan and his wife, Mara, live in the Green Hills area of Nashville.

Previous Experience

- Vice President at the Ascension Saint Thomas Foundation
- Director of Capital Giving at Belmont University
- Executive Director of the Tennessee Business Roundtable





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