

Profile Family Office

Investing where it counts

PROFILE PERSPECTIVES

PFO'S CHARITABLE ASSISTANCE SERVICE

People trying to look beyond the short-term political problems in Israel are continuing, and often increasing, their charitable activities. Philanthropic individuals and foundations have been calling on the Profile Family Office to help make sure their donations go to build organizations with top-tier leadership, quality management, a clear mission, well-structured programs, and a positive attitude that attracts more donors, volunteers, and clients.

While giving charity may be a pure-hearted move, it can contain some risk for the donor. This risk corresponds to the ability of the charity's managers to use the money to make the greatest impact towards achieving the donor's worthy goal. Since philanthropic investments may have different levels of risk, donors can direct their money towards "blue-chip" causes or "venture charity."

The Profile Family Office works to increase the success of charities in Israel by helping donors give gifts that will work as effectively as possible. To ensure a long-term positive result from substantial gift giving, donors may take an active role with the charity. If they're unable to personally oversee their donations, though, they can call on Profile to help in such areas as:

- Examining the organization's short-term and long-term strategic plan, specifically focusing on budgeting and accountability
- Making sure the services to be provided have solid underlying systems and are actually achievable

- Encouraging and helping to implement new programs inside the organization
- Reviewing the credentials of the leaders and their staffs to make sure the right people are handling the donors' money
- Teaching and coaching the charity to utilize some of the money for leadership training, outside fundraising, recruiting volunteers, and other professional services
- Following up to oversee and audit the ongoing results of the investment

In the case that Profile is called to upon for assistance *after* problems arise, our office deals with:

- Financial crisis: When the charity seriously mismanages funds or suffers from a severe budgeting problem
- Leadership crisis: If the wrong people are running the show, or if a key figure resigns or dies
- Situational crisis: When a swift change in the economy or government outlook causes an acute problem for the charity

Rather than working for specific charities, Profile works for the donors to make sure that their interests are fully represented. Just like the Profile Family Office's parent company, Profile Investment Services, LTD., helps clients manage their securities portfolios, the Profile Family Office helps clients care for their charitable portfolios.

"Many donors view the money that they give to charity as an investment in that cause," explains Yoram Ohana, Profile Family Office's Manager, Special Services. "They want to know that, just like their investment advisors keep a close eye on their securities portfolios, equally capable advisors are watching over the money that they've invested in a charity."

CONTACT INFORMATION

The Profile Family Office is a division of Profile Investment Services, LTD. With a presence in Jerusalem, Tel Aviv, Florida, and New York, Profile Investments helps an international clientele with both their investment and philanthropic portfolios. For more information, e-mail PFO@profile-financial.com, or go to www.profile-financial.com.

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*Fools rush in where
angels fear to tread*