

CAF America

DONOR ADVISED FUNDS



CAF AMERICA GRANTMAKING BY LOCATION - 2015



TOTAL = \$106,576,400

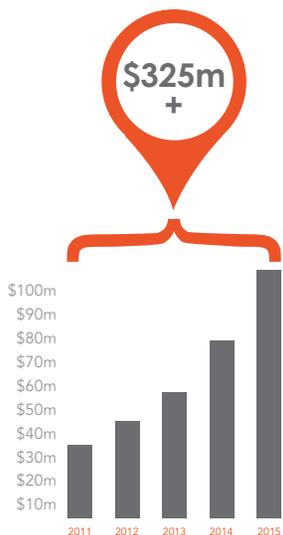
CAF AMERICA GRANTMAKING BY LOCATION - LAST 5 YEARS



TOTAL = \$332,671,607



WE ARE...LEADING



CAF America has given more than \$325 million to charitable organizations in over 100 countries in the last 5 years alone.

For more than 22 years, Charities Aid Foundation of America (CAF America) has broken down the barriers to cross-border giving. As an international and domestic donor advised fund serving corporations, foundations, and individuals, we streamline the grantmaking process to eliminate risk and administrative burden.

Through our work, we help donors support great causes by assisting them in making strategic, effective, and tax-advantaged grants both internationally and domestically. We provide our clients with a truly global approach, leveraging the expertise of advisors on the ground in Africa and Asia-Pacific, as well as the CAF Global Alliance, which spans six continents and manages over \$4 billion in charitable funds.

Fiscal year 2015 was a year of evolution for CAF America. We not only achieved significant growth in our traditional

philanthropic areas, but simultaneously expanded our services to better advise a growing market of donors – high-net-worth individuals. Further, we successfully launched our West Coast presence in San Francisco as well as officially opened CAF Canada, our global giving solution for Canadian taxpayers. To conclude this remarkable year, CAF America hosted, and received critical acclaim for, our first International Grantmaking Symposium in partnership with the Johns Hopkins School of Advanced International Studies.

In the past year alone, CAF America and its subsidiaries, CAF Canada and the CAF American Donor Fund (CADF), gave more than \$100 million to charitable organizations in over 70 countries. To ensure continued growth and success, we are continuing to develop new and unique ways to help donors expand their efforts in the coming decade.



WE ARE...HELPING

SUCCESS BY THE NUMBERS 2015

\$107,348,465 in total contributions

2,556 grants made, totaling **\$106,576,400**

963 charities vetted in **64** countries

Grants made in **74** countries, from Antigua to Zambia

In fiscal year 2015, CAF America focused on deepening our engagement with the corporate sector while also expanding our efforts to become a trusted resource for wealth advisors and estate planners.

The result was a record-breaking year of donations and grants – a measure of success that is a direct result of the generosity of our clients, both new and long established.

New Clients

CAF America witnessed a significant increase in new clients of all types in fiscal year 2015, opening 35% more donor funds than in fiscal year 2014, and 53% more funds than in fiscal year 2013.

Corporations

Corporations, CAF America's largest vertical, continued to grow on an upward trajectory. In fiscal year 2015, corporate

funds accounted for 48% of all open funds and increased in total number by 21% from fiscal year 2014. Overall, CAF America opened 38% more new corporate funds than were opened in fiscal year 2014 and 120% more than were opened in fiscal year 2013.

Wealth Advisors

While CAF America's traditional client base is corporations, fiscal year 2015 culminated with a record number of wealth advisors choosing to partner with CAF America for our knowledge and expertise in global philanthropy.

Donor Advised Gift contributions, the mechanism most used by our HNW clients, increased by 89% from fiscal year 2014. A significant portion of this growth can be attributed to an increase in high-net-worth-individual donors.



WE ARE...SERVING

NEW FOCUS

In order to service Wealth Advisors better, CAF America created a Wealth Advisory Council. These are experts in the field to help guide our efforts.

J. Max Barger, J.D.

Vice President | Senior Wealth Planner
PNC Wealth Management

Brad Bedingfield

Counsel (Wealth Management)
Choate, Hall & Stewart LLP

Peter M. Cohen

Chairman and Board Member
Trident Trust Group

Jennifer Murtie

President
Federal Street Advisors

Jane Peebles

Partner and Attorney
Karin & Peebles, LLP

David E. Ratcliffe, CAP®, CTFA

Managing Director
National Philanthropic Solutions:

For CAF America to remain a valuable and reputable resource for our donors, we recognize the need to become a versatile player in international grantmaking.

To us, this means continuously striving to find new ways to serve more clients, and developing a heightened level of expertise that ensures our services meet the needs of each type of donor.

To achieve these goals in fiscal year 2015, we shifted our strategy to include a more refined focus on the wealth advisor space. Attending key conferences such as the Heckerling Institute of Estate Planners and the American Institute of

CPAs, CAF America launched itself as a trusted expert and advisor on global philanthropy. As part of this initiative, we also developed a Wealth Advisory Council to focus on messaging and outreach.

Thus far, the initiative has been a huge success, with more than \$7 million in donations coming from high-net-worth individuals alone in fiscal year 2015.



WE ARE...INSPIRING



INTERNATIONAL GRANTMAKING
SYMPOSIUM



Inspiration, Education, and Application set the framework for attendees who heard from experts in international grantmaking including keynote speaker Tomicah Tilleman.

CAF America has increased its offerings in recent years to respond to the needs of our donors. With that in mind, we entered fiscal year 2015 with the intention of positioning CAF America as a “one stop shop”, providing tangible services in both transactional and advisory capacities.

To that extent, last spring CAF America held the first ever International Grantmaking Symposium (IGS) in collaboration with the Johns Hopkins University School of Advanced International Studies. At the IGS, an international delegation of participants gained firsthand exposure to training provided by CAF America, an in-depth understanding of international grantmaking, and an ability to maximize giving strategies abroad.

Speakers and panelists at the inaugural event included:

- **Tomicah Tilleman** | Senior Fellow, Director, New America
- **Heather Grady** | Vice President, Rockefeller Philanthropy Advisors
- **Alexander Dixon** | Senior Director, Diaspora Investment Alliance
- **Paul Ladd** | Head of Post 2015 Development Agenda, UNDP
- **John Bennett** | Simpson Thacher & Bartlett
- **Joseph Myers** | VP, BSA AML Risk Assessment, Global Compliance Programs, Western Union

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“The time is opportune for CAF America to try to fill the current void in professional development for US-based global grantmakers.”

The symposium received wide acclaim from participating organizations and individuals, earning a positive review from Alliance Magazine, with the author asserting:

“At the symposium, CAF America demonstrated particular strength in professional development on regulatory and tax compliance issues in US-based grantmaking: equivalency determination (ED) and expenditure responsibility (ER) as well as OFAC, anti-terror, and related compliance. .. Where these topics are concerned, I have never witnessed a more thorough and intensive training.”

CAF America is increasingly recognized for its innovative and thoughtful approach to international grantmaking. The organization was the only intermediary selected as a consulting affiliate by The Shared Value Initiative, placing CAF America at the forefront of international corporate philanthropy. In addition, CEO Ted Hart received the Chartered Advisor

in Philanthropy designation from The American College of Financial Services, thus strengthening CAF America’s capacity to advise ultra-high-net-worth individuals and wealth advisors on their philanthropic estate planning needs.

Finally, CAF America made great strides in building long-term cross-sector partnerships in 2015. Of note, CAF America became an official strategic partner of the Diaspora Investment Alliance (DIA), a policy program developed in partnership with the Rockefeller Foundation and the Aspen Institute. The DIA aims to design a targeted and coordinated approach to facilitating the strategic investment of financial and human capital from diaspora individuals to their home countries. CAF America will act as the donor advised fund vehicle, accepting donations from diaspora members and making grants to qualified organizations across the globe.



WE ARE...CAF AMERICA

LIST OF SERVICES

- Donor Advised Funds
- Matching Gift Services
- Single Donor Advised and Restricted Gifts
- Equivalency Determination
- Expenditure Responsibility
- Disaster Relief Funds
- International Global Advisory Network
- Corporate Advisory Services
- Friends Funds
- CAF American Donor Fund (for dual US and UK taxpayers)
- CAF Canada (for Canadian taxpayers)

CAF Global Alliance

CAF America is a member of the Global Alliance of the Charities Aid Foundation. The CAF Global Alliance spans six continents and manages \$4.6 billion in charitable funds.

As a member of the CAF Global Alliance, CAF America has the unique ability to connect donors with local issues and the foreign charitable organizations on the ground addressing them. With access to regional CAF Offices and an experienced group of international consultants, donors can rely on thorough and timely support and advice.

CAF America, works with the CAF Global Alliance to disseminate the findings of the *CAF World Giving Index*, the world's only truly global index of generosity. The annual poll, which is conducted by Gallup, measures changes in giving patterns in more than 135 countries around the world and continues to have been fueling discussions about giving since 2010.

BOARD PRESIDENT

Rob Buchanan



"With over \$107 million dollars in total revenue in 2015, CAF America shows remarkable growth and permanence in a complex international

setting. We demonstrate the requisite expertise and capacity to remain a leader in domestic and international grantmaking, and are dedicated to providing the very best services to our donor clients."

CEO

Ted Hart, ACFRE, CAP®



"CAF America continues to set standards for trusted due diligence and grantmaking. In 2015, we entered the Chronicle of

Philanthropy's annual listing of the top charities, The Philanthropy 400. We hosted the first International Grantmaking Symposium, expanded wealth advisory services, and our donors advised gifts to more charities than ever. We look forward to new philanthropic opportunities around the world."



CAF

AMERICA

FULL SERVICE GLOBAL GRANTMAKING

1800 Diagonal Road • Suite 150 • Alexandria, VA 22314
office: 202-793-2232 • fax: 703-549-8934

50 California Street • Suite 1500 • San Francisco, CA 94111
office: 415-439-5347 • fax: 415-439-5299

www.cafamerica.org