

Since 2003, Charitable Solutions Has Worked with More Than 400 Charities with Endowments Ranging From \$2 Million to \$20 Billion. How Can We Help You?



Noncash Asset Receipt/Disposition Consulting

Last year our 30-person team received more than 3,000 noncash inquiries from community foundations and other charities, and completed over 650 non-cash donations (private stock, real estate, crypto currency, etc.) totaling \$1.7 billion with each donation averaging \$2.5 million. Every one of these gifts were declined by the referring charity. Since 2003, we have completed more than \$7 billion in noncash asset donations through Dechomai Foundation. www.dechomai.org



Artificial Intelligence Innovation

In 2025, we developed two powerful and very popular tools:

- The Gift Planner's Workstation,™ also known as "Frank," your copilot for navigating the complexities of noncash assets, endowments and planned gifts. Frank enables quick, thorough and professional proposals tailored to your donors or professional advisors.
- AI Companion, also known as "Max," a customizable AI tool for your organization's website, that engages donors directly. Max can answer questions, explain processes and provide insights on planned gifts, non-cash donations, funding trusts, and more.



Charitable Gift Annuity Risk Management Audits

Many charities operate gift annuity pools either for their own donors, for other non-profits or both. While these gifts are extremely attractive and simple to understand for donors, they also are very complex to manage from a liability and policy standpoint. We have written nearly every paper that has ever appeared on CGA risk management/mortality since 1997 and have completed over 200 audits on over \$2.5 billion in gift annuity assets.



Charitable Appraisals

In 2025, our team completed more than 350 qualified appraisals (and Form 8283) exclusively for charitable donations on the following assets:

- Business Interests – C-corp, S-corp, LLC, LP interests
- Restricted Stock/MLPs
- Life Insurance/Annuities (including portfolio audits/management)
- Precious Metals
- Art/Intangible Property
- Cryptocurrency (Bitcoin and altcoins)
- Oil/gas interests
- Fractional Real Estate Interests



Customized Equity and Loan Impact Investing

Our noncash structure allows us to make direct DAF investments/loans for PRI type investments with longer term or indefinite holding periods. We do not offer investment pools, only the ability to invest directly into a single or small group placement, where all holding period income and future proceeds may be granted subject to our advised fund policies.



Charitable Remainder Trust Services

Dechomai Foundation can serve as trustee for Charitable Remainder Trusts for liquid or illiquid assets. We offer a comprehensive CRT platform to include turn-key documents, trusteeship, administration and tax reporting.



Charitable Gift Annuity Reinsurance Brokerage Services

We help charities understand what reinsurance is and isn't and when it works and doesn't. Charitable Solutions, LLC, provides an hourly fee analysis to determine whether Charitable Gift Annuity (CGA) reinsurance makes sense for your charity, and an objective review of product design and quotes.



Continuing Education Speeches

In 2025 we delivered more than 80 speeches (virtually or in person) for professional advisor CE, staff/board/nonprofit training or donors. We have given more than 1,000 speeches to community foundations alone, including at state associations or national conferences.



Emergency Assistance Fund Administration

Our Emergency Assistance Foundation has 130 staff members and serves 430 corporate relief funds globally (13 million employees). We recently launched a turn-key People First platform to help individuals impacted by specific disasters with cash grants in the first 24 hours. www.emergencyassistancefdn.org



National Gift Annuity Foundation

Our National Gift Annuity Foundation, licensed in all 50 states, ended the year with more than 1,200 annuity contracts under administration, collectively valued at over \$100 million. We grant 100% of the residuum where the donor wishes, including community foundation funds. www.nationalgiftannuity.org