

# Maximizing your gift growing programs

Insights  
2025

Our sole focus in State Street Investment Management's Charitable Asset Management group is to help our clients maximize their gift planning programs by assisting each organization in building and maintaining strong donor partnerships, closing more planned gifts with higher gift values, and preserving and growing endowments.

## Who we are

Charitable Asset Management provides consultative and customized planned gift investment management, tax, and administration solutions for charitable organizations. Established in 1984, Charitable Asset Management is a boutique group within State Street Investment Management dedicated to serving nonprofit organizations and their donors. Today, our 25+ planned gift specialists work with close to 200 charities and manage more than \$3 billion dollars in charitable assets for 27,000 donor/beneficiaries.<sup>1</sup> Our charitable clients include colleges, universities, foundations, private schools, hospitals, and cultural, environmental, community religious organizations.

## Comprehensive administration

Dedicated relationship management teams provide personalized services to each client while utilizing our gift planning, investment management, tax, and fiduciary experience. Charitable Asset Management's service model provides our clients with comprehensive administration, accurate and timely beneficiary

payments, a wide range of statements and program reports, and online access. Our team offers a deep bench of dedicated gift planning specialists, all focused solely on supporting your and your donors' specific needs.

## Sophisticated investments

Charitable Asset Management's dedicated investment team has extensive experience and a deep understanding of the specific complexities in managing planned gift assets. We seek investment solutions that can deliver consistent long-term performance while balancing the interests of the income beneficiaries with those of the charity. We employ a core disciplined process driven by skilled managers who draw upon our resources and industry experience to customize investment programs specific to each planned gift vehicle.

## Charitable tax work

Our in-house charitable tax team is solely dedicated to the delivery of life income gift tax reporting for our clients. They distinguish Charitable Asset Management with their record for timely, accurate tax returns and the ability to educate our clients on the newest changes to tax law.

## Collaboration and support

State Street Global Advisors believes in building strong partnerships with our clients and their donors. We communicate regularly through face-to-face meetings, conference calls and customized reports to keep each client informed about their program. We offer consultation, assistance with donor inquiries, training for staff, board and donors, as well as updates on current issues and trends in gift planning, tax and investments.

## Our offerings

### Gift administration

- Custody, manage and execute all administrative functions for planned gifts
- Calculate and remit payments to income beneficiaries
- Assist with gift annuity state filing requirements

### Investment services

- Advise on Investment Policy
- Implement the investment program and asset allocation strategy
- Rebalance portfolios
- Provide performance reports and account statements

### Charitable tax services

- Dedicated Charitable Tax Unit to complete required planned gift tax information
- Educate clients on newest changes to tax law

### Gift planning consultation

- Review trust documents
- Deliver technical assistance and training for staff
- Provide marketing ideas and legal/regulatory/tax planning suggestions

## Stewardship support

- Provide support and consultation in closing complex gifts
- Deliver planned gift, estate, tax and fiduciary information to assist with the cultivation and education of donors

## Contact us

For more information, please visit [ssga.com/cam](https://ssga.com/cam) or email [CAM\\_SSGA@ssga.com](mailto:CAM_SSGA@ssga.com).

## Endnote

- 1 State Street Investment Management Charitable Asset Management as of December 31, 2024.

## [statestreet.com/investment-management](https://statestreet.com/investment-management)

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Investing involves risk including the risk of loss of principal. State Street Global Advisors, Charitable Asset Management. One Iron Street, Boston, MA 02210.

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