



Private philanthropy

Navigating complexity with confidence – from vision to impact

Philanthropy is more than giving, it's about shaping tomorrow

Today, philanthropy goes beyond generosity. It is about translating values into action and directing resources toward results that create long-term impact.

For many philanthropists and families, this means moving from informal giving toward more deliberate, disciplined, and long-term

commitments, often with the intention of creating something that outlives the founder and becomes a lasting legacy.

Strategic philanthropy transforms intent into impact. But doing it well requires more than good intentions.



From vision to long-term commitment

As philanthropy becomes more structured, a different set of decisions comes into focus. At this point, a few critical questions arise:

- **What impact do we want to achieve, and over what time frame?**
- **Where should we focus our resources to achieve that impact?**
- **What needs to be in place so this works well in practice?**
- **How will we know what is working, and when to adjust?**

As philanthropy expands in scope and ambition, complexity grows, challenging priorities, coordination, and visibility of results. Existing frameworks are tested, and confidence in execution becomes essential.

These decisions determine how capital is allocated, how responsibilities are organised, and how philanthropy performs over time.

Our focus

We assist philanthropists at the pivotal moment when giving becomes a long-term commitment.

Our efforts concentrate on making those initial decisions count, leveraging our experience with how foundations and philanthropic initiatives develop over time.

We typically support clients across the following areas



Purpose and direction

Clear ambition:

- Purpose discovery, including alignment with family and business identity
- Mission and vision
- Risk appetite

Strategy and portfolio design

Focused priorities:

- Philanthropic strategy
- Portfolio structuring
- Strategic roadmap

Foundation set-up

Appropriate structure:

- Legal, tax & regulatory assessment exemption process
- Foundation set-up support

Governance and operating model

Clear decisions:

- Operating model design aligned with scale
- Governance, decision-making and reporting frameworks

Grant management and impact delivery

Confidence in delivery:

- Review and design of the grant management
- Partner due diligence and assessments
- Monitoring reviews across portfolios

Impact measurement and independent review

Evidence that drives decisions:

- Impact and monitoring framework design
- Independent financial and non-financial reviews

Benefits

- **Get the set-up right from the start:** begin with a robust setup to avoid early design choices that could hinder future success.
- **Enable disciplined decision-making:** as commitments grow, make informed choices about where to focus, continue, or stop.
- **Mitigate risks early:** address execution and partner risks upfront, ensuring delivery is scrutinised before issues arise.
- **Build confidence in impact:** understanding what is working and when to adjust.
- **Meet supervisory body expectations effectively:** supported by our extensive experience guiding clients through oversight processes.

Why PwC?

- **Long-standing experience in philanthropy and international development:** supporting Swiss foundations and international organisations over more than 20 years.
- **Independent perspective:** bringing clarity and rigour to important choices.
- **Focused governance and decision-making:** helping clients establish clear roles, effective oversight, and sound decisions.
- **Swiss-based with global reach:** local foundation expertise supported by PwC's global network when required.

Let's talk



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