



Ask the Funder: Whittier Trust

Thurlow/Associates is grateful to Whittier Trust Senior Vice President of Philanthropic Services Pegine Grayson for sharing information with us about the Trust and its work — and we're pleased to pass the information along!

Tell us about Whittier Trust's work in relation to philanthropy.

Whittier Trust is a privately held wealth management firm. Among the comprehensive services we provide to our ultra-high-net-worth clients is support for their philanthropy. We've been managing family and private foundations and charitable trusts (serving as an outsourced central office and staff) for more than six decades.

More recently, we added a unique, highly flexible donor-advised fund platform, tailored specifically to meet the needs of high-net-worth donors. In addition, we consult with our clients to help them identify their mission, vision and values; meaningfully involve their children and grandchildren in their philanthropy; and structure complex planned gifts.

We offer an extremely low client-to-advisor ratio of 20 to one, which enables us to get to know our clients and their families intimately — and to serve them well for generations.

What is the firm's role in the proposal/solicitation review process on behalf of your clients?

In a nutshell, we strive to make the philanthropic process as easy as possible for our clients, so that they can enjoy the rewarding aspects of their charitable giving.

Our clients are always the decision makers and Whittier's staff facilitate the decision-making process in precisely the way each family or board of directors/advisors desires. Sometimes this includes helping our clients to identify charities and projects (or possible program- or mission-related investment opportunities) that map to their particular passions. Other times, our clients already have meaningful connections to charitable organizations in their area of interest and they simply want us to handle the grantmaking logistics.

We also recognize that our clients can't achieve their philanthropic missions without the passion and hard work of their chosen grantees. On their behalf, we help nonprofit funding applicants to navigate our application process, conduct due diligence to monitor funding recipients' compliance with grant requirements, and more.

What are some of the elements that set a solicitation apart from the rest, in your opinion?

At a minimum, requests should be well written, free of grammatical or typographical errors, and succinct. (Our rule of thumb is that a letter of inquiry



shouldn't exceed three pages in length.)

What really separates the wheat from the chaff, however, is the ability to make your case for support in a compelling way that conveys passion for and excellence in what you do. That usually means telling effective stories.

Funders are people, and lots of research has shown that people respond more positively to stories about a nonprofit than to statistics and detailed descriptions of its various programs. They also remember those stories better. The data are important, but can be pared down or relegated to footnotes to make room for a story or two that leaves the reader saying, "I want to be a part of that."

Any pet peeves when it comes to solicitations/proposals/packaging?

This will likely be something you've heard before, but we still see these issues crop up:

- Ignoring page-length limitations.
- Sending in copious amounts of collateral material (e.g., annual reports, videos, newsletters) with a letter of inquiry. This makes us wonder how decisions are made regarding the allocation of scarce resources.
- Late submissions. Grantees need to understand the bind it creates when late submissions challenge foundation staff's own ability to get materials out to their board on time.

In addition to philanthropic planning/trust management, we understand that Whittier Trust offers a variety of other services. Can you let us know more?

Whittier Trust is essentially the oldest and largest multifamily office headquartered on the West Coast. Our services include investment management using a tax-sensitive, customized portfolio approach (as opposed to a fund-driven model with hidden and layered fees); corporate trustee and executor services, including a tax-advantaged situs through our Nevada trust company; comprehensive family office services; and real estate services (managing/overseeing our clients' real estate investments, as well as sourcing new investment opportunities for their consideration).

See our website for more information, including Pegine's ["Seven Habits of Highly Ineffective Grantseekers"](#)!