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The Top 5

## The Very Best Philanthropic Advisers

These consiglieres have worked with the likes of Bezos, Bloomberg and Soros and also understand that the young and wealthy may have different priorities in giving than the previous generation did.

By Julia Black

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**So you've sold** your company, hit it big in crypto or maybe discovered that a long-promised trust fund has more in it than expected. How do you give some of it away? And who can help—especially if you don't want to go the stuffy old-money route and etch your name onto some hard surface at Harvard? Fortunately, a crop of modern philanthropic advisory firms has sprung up in recent decades. These firms can craft bespoke giving plans that often combine tax-deductible giving, impact investing and political advocacy.

For this piece, I spoke with leaders in the field for their recommendations on the best philanthropic advisers at the top firms and then interviewed the advisers themselves to get a sense of their approach. These organizations offer a wide range of services, from wrangling family offices, wealth advisers and attorneys, to performing deep due diligence on individual nonprofits, to mediating disputes among client family members. They preach and practice a philanthropic mantra that we might term effective altruism had someone else not previously hijacked the term.

### Jessica Robinson Love

Senior managing director, *Arabella Advisors*

You might have heard about Arabella Advisors in the context of the nonprofits it operates in the political sector, which have partnered with Bill Gates, George Soros and Mark Zuckerberg to direct big money to left-leaning political causes (and have given us the phrase “*Zuck bucks*”). But the firm also has a consulting arm that works with individuals and families to build personalized social impact strategies.

Based in the San Francisco Bay Area, Arabella has a client base that largely made its wealth in the tech sector, and that's reflected in the firm's approach. According to Jessica Robinson Love, senior managing director, Arabella often works with tech clients to find causes that are “connected to their company and what they did in the world.”

Arabella's process takes into consideration each client's priorities (climate change and democracy are popular these days), potential giving structures (maybe a foundation or a donor-advised fund) and a variety of levers they might choose to work with (nonprofit donations, political giving or even leveraging investment dollars toward social causes).

Robinson Love finds Arabella works best with clients who seek “sophisticated social change.” She sounded a cautionary note when she said, “If you want to give to a hospital or get your name on a building at a university, that's great. You don't need us.”

*Arabella Advisors recommends its services to clients who can spend at least \$1 million on annual giving. Fees vary widely, but you can expect something in the \$50,000 to \$70,000 range for a short-term consulting project, or \$120,000 and up for annual commitments.*

## Stephanie Ellis-Smith

CEO, [Phila Engaged Giving](#)

Phila Engaged Giving is one of just a handful of philanthropic advisories working with individuals and families that is founded and led by people of color. The firm counts billionaire Giving Pledge signatories, athletes and celebrities among its A-list clientele.

Phila takes pride in its creativity and often seeks solutions beyond traditional modes of giving. It recently helped one client transform 3,000 acres in Indiana into a farm using regenerative agriculture techniques. Phila, which is based in Seattle and Chicago but works nationwide, also advises clients on non-tax-exempt giving opportunities like political donations, catalytic capital investments and even supporting individual artists. “In our book, it all counts,” said Phila founder Stephanie Ellis-Smith.

The firm has worked with early Microsoft employees Bill and Holly Marklyn to create The Share Fund, their grantmaking organization focused on racial and gender justice. The firm’s target client base is “folks who are not afraid of a little self exploration, and also people who want to have fun and are willing to lean into the joy of it all,” Ellis-Smith said.

*Phila Giving is best for clients who can give \$100,000 or more per year. The firm typically works on a retainer schedule; hourly fees range from \$350 to \$450.*

## Chris Addy

Partner, [The Bridgespan Group](#)

When MacKenzie Scott needed guidance on how to turn the windfall from her divorce from Jeff Bezos into a record-breaking run of philanthropic giving, she retained The Bridgespan Group. Bridgespan partner Chris Addy said the 26-year-old firm has also worked with 14 people on [Forbes’ list](#) of the 25 most generous philanthropists in the world, including Bill Gates and Michael Bloomberg. Bridgespan, which was born out of Bain & Co., performs deep due diligence on potential beneficiaries with data analysis and screening interviews.

Addy, who is based in Singapore, has worked with a number of Silicon Valley clients. In 2018, he helped set up The Audacious Project, a funding initiative run out of TED that pools resources to support ambitious, multiyear philanthropic projects.

With three offices in the U.S. and three international offices, Bridgespan is the big kahuna of the field. “Think of them as like a McKinsey & Co. for the nonprofit sector. Similar price tag. You engage Bridgespan, and you’re paying, but you’re getting really, really good evaluations,” said Michael Thatcher, president and CEO of charity assessment organization Charity Navigator.

*The Bridgespan Group offers a broad array of services, from rapid sourcing and due diligence to massive multiyear commitments. But according to Addy, unless you’re in a position to donate “a few million a year,” it may not be worth engaging Bridgespan’s services. Fees vary but are measured in months rather than hours.*

## Erinn Andrews

CEO, [GiveTeam](#)

While she was serving as director of Stanford’s Effective Philanthropy Learning Initiative, Erinn Andrews came to believe that existing philanthropic solutions were too overwhelming and time-consuming for some donors. In 2022, she founded her own organization, GiveTeam, to offer an alternative.

Many philanthropists who had more wealth than time to spare, she found, were falling back on “reactive giving”—in other words, throwing cash at big international nonprofits with name-brand recognition, or at their alma maters or their children’s schools. GiveTeam uses its proprietary regional databases of small and medium local nonprofits, like the San Francisco Bay Area’s StreetCode Academy and Birth Center Equity, focused on maternal-fetal health, to help clients identify more direct and personal forms of impact.

Following an initial consultation, GiveTeam presents its clients with 9 to 12 handpicked nonprofits it believes will maximize impact in a given cause, as well as the donation ranges that make the most sense based on clients’ budgets. After that, clients may choose to hire the company for annual reviews to receive updates on the impact of their investments and recommendations for moving forward. “The solution we offer is different from the existing offerings, because it’s not meant to take over your life or be a major part of what you do, but it’s thoughtful and intentional,” said Andrews.

*GiveTeam recommends its services for those able to give \$10,000 or more a year. Fees are \$2,500 for the initial consultation and \$1,000 for every annual review.*

## Susan Winer

Co-founder, [Strategic Philanthropy](#)

“Every donor should be an informed donor, not just writing a check. They should be building partnerships with the organizations they give to, not just looking at it as noblesse oblige,” Susan Winer told me.

If you’re looking for a firm with a bit more history, you might be interested in the one she co-founded in 2000: the Chicago-based Strategic Philanthropy. Winer, who sits on the board of The Ultra-High-Net-Worth Institute, also continues to work with individual clients.

Strategic Philanthropy employs a full-time grants administrator, has a proprietary grants management program and can serve as the back office administrator for family foundations. “We can literally staff the foundation and provide all the support a client needs around their giving, all at a competitive price point,” said Winer.

*Strategic Philanthropy works with clients who can commit to giving at least \$250,000 a year. The firm offers both annual retainers for long-term engagement and project-based fees.*

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*Julia Black covers the nexus of tech, media, politics and culture for The Weekend section.*