Allwell

Allwell is a philanthropic advisory firm that guides individuals, families, and their advisors to give of their time, talent, and treasure with greater clarity, purpose, and impact.

A GUIDE FOR FAMILIES AND THE ADVISORS WHO SERVE THEM

Why work with a philanthropy advisor?

What a philanthropy advisor does, the value it brings to your giving and your family, and how Allwell works alongside your wealth team.

The case
Why thoughtful givers bring in a specialist

The value
What changes for you, your family and your advisors

Our services
How we work and what an engagement includes

THE CASE

Give with clarity, confidence, and connection

Most families with significant wealth have a team for investments, taxes and estate planning. However, when it comes to giving, the options are less clear.

At Allwell, we guide you to discover, define, and align your giving strategy. We help you understand **why you give, what you want your giving to accomplish, and how to do it well.**

> *"It is more difficult to give money away intelligently than to earn it in the first place."*
>
> ANDREW CARNEGIE

By taking time to thoughtfully consider these questions, we make the process less difficult, more connected to your why, and ultimately more rewarding.

80%

of high-net-worth clients have had philanthropic needs that exceeded their advisor's knowledge

75%

say they are more likely to choose an advisor with philanthropic expertise

$326B

held in donor-advised funds in 2024, much of it waiting for a plan

Sources: The Philanthropic Initiative survey of 300 advisors and 103 high-net-worth donors (2026), reported by Crain Currency; Annual DAF Report 2025, Donor Advised Fund Research Collaborative.

Signs it may be time

- ○ You give generously but can't say what difference it makes
- ○ Your donor-advised fund or foundation is growing faster than you're granting
- ○ You've sold a business or had a liquidity event and want a plan for the charitable portion
- ○ Requests arrive faster than you can evaluate them
- ○ You want your children to inherit your values, not just your assets
- ○ You and your spouse care about different causes and haven't found common ground

THE VALUE

What changes when giving has a plan

Philanthropy means "love of humankind." Done thoughtfully, it changes the world, and the giver.

01

Clarity and focus

We help you name what you care about and why, then narrow dozens of causes to a few priorities where you can make a real difference. Saying yes gets easier. So does saying no without guilt.

02

Giving that works

We look past the brochure to what drives results: leadership, board, strategy, finances and honest measurement of impact. Our insight comes from 500+ leadership searches across 350+ nonprofits.

03

A family that gives together

Giving creates a shared language for values. We help spouses find common ground and bring children and grandchildren into the work, so generosity becomes a lasting family identity.

04

Time and peace of mind

A clear plan replaces a pile of requests. You know where your giving is going, why, and what it's accomplishing, with a partner to handle the research and follow-through.

05

Joy and meaning

Research consistently links sustained, intentional giving with greater happiness, better health and a stronger sense of purpose. The benefits come from giving that reflects who you are and makes a visible difference, not from reactive check-writing. Helping you experience that is the heart of our work.

For wealth managers and family offices

Philanthropy opens a different kind of conversation with your clients: about their heart and their history, what shaped them and what they hope to leave behind. We bring the expertise clients are asking for and keep you in the room, so the relationship grows deeper and reaches the next generation. We don't manage assets or sell products, and our fees can typically be paid from a client's donor-advised fund.

OUR SERVICES

How we work

Every engagement is customized. Most move through three phases.

PHASE 1

Discover

We start with you: your story, your values, and the moments that shaped why you care.

PHASE 2

Define

Together we build a giving vision and plan with clear priorities, partners and measures of success.

PHASE 3

Align

We bring your family into the work and connect your resources with the leaders best placed to use them.

Giving vision

Why do we give?

Guided conversations that surface your values, story and convictions, captured in a written giving mission statement.

Giving plan

What will we do?

A practical plan across time, talent and treasure.

- Focus areas, annual giving targets and anchor partners
- A strategy for your donor-advised fund or foundation
- Simple ways to track progress and learn over time

The next generation

Who carries it forward?

Family giving meetings, age-appropriate ways to involve children and grandchildren, and support for successor advisors and family boards.

Nonprofit insight

Where will it do the most good?

Due diligence grounded in two decades inside the social sector: leadership strength, board health, strategy, finances and evidence of impact.

Ongoing partnership

How do we keep it alive?

Periodic check-ins to review grants, refresh priorities and adjust as your family and the world change.

WORKING TOGETHER

A partner to you and your advisors

The best outcomes come when everyone on your team is talking.

Alongside your wealth team

Your wealth manager, family office and attorneys lead on investments, tax and legal structures. We focus on purpose, priorities and people. With your permission, we share your giving plan with your advisors so it fits your broader financial picture.

How it's paid for

We work on a project or retainer basis. Donor-advised fund grants can't provide a personal benefit to the donor, but they can pay for advice whose purpose is to maximize the impact of the fund's charitable giving. That is the focus of our work, so our fees can typically be paid from your donor-advised fund, with your sponsor's approval.

Who we serve

- Individuals and families who give meaningfully, or plan to
- Families after a liquidity event, estate plan or generational transition
- Donor-advised fund holders and private foundation families
- Wealth managers and family offices seeking a philanthropy partner for their clients

Every engagement is customized, and every one keeps your wider team informed and involved.

This guide is general information, not tax, legal or investment advice. Please consult your own advisors about your situation.

WHO WE ARE

Decades inside the social sector

Between us, we have led, built, governed and funded nonprofits, and advised the foundations and families who support them.

Katie McNerney CO-FOUNDER

Katie founded LeaderFit, an executive search firm serving nonprofits and foundations, and has led it for the past 17 years. The firm has completed 500+ leadership searches for 350+ organizations, including many in philanthropy:

Large family foundations
Rockefeller Foundation, Marriott Foundation, Walton Family Foundation, Crown Family Philanthropies

Small family foundations
CrimsonBridge, Weissberg, Peterson, Clark

Community foundations and think tanks
Greater Washington Community Foundation, Exponent Philanthropy, National Center for Family Philanthropy, Spur Local (formerly Catalogue for Philanthropy)

Katie also brings extensive board and nonprofit leadership experience. She has served on three nonprofit boards, as founding CEO of EdFuel and as founding COO of Noēsis Collaborative. She holds an MBA from Harvard Business School.

Heidi Metcalf Little CO-FOUNDER

Heidi has advised foundations, philanthropists, corporations and U.S. government agencies through Geneva Global, Markel Corporation and her own private practice. Her expertise includes international philanthropy: she was a Senior Fellow and Deputy Director of the Hudson Institute's Center for Global Prosperity, whose work continues through the Global Philanthropy Indices at the Indiana University Lilly Family School of Philanthropy.

Her nonprofit experience is extensive. She founded a nonprofit that is now 30 years old and thriving, has taught nonprofit management as adjunct faculty, and is a veteran member of many nonprofit boards. She holds a Master in Public Policy from the Harvard Kennedy School, with a concentration in nonprofit management.

Start with a conversation

Tell us about your family, or the families you serve. We'll share how we'd approach the work.

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