



MOORE
PHILANTHROPY
advisory | impact | investment

OUR
OVERVIEW



ABOUT MOORE PHILANTHROPY

Moore Philanthropy is a Black-owned advisory firm providing thoughtful, strategic and tailored philanthropic services to individuals, families, and private institutions using a social justice lens. Every decision we make as a firm to support the stakeholders we serve is grounded in principles of equity and inclusion. While Moore Philanthropy serves the needs of families from all walks of life, we have an intentional and demonstrated commitment to serving the African Diaspora and their families, and building the wealth and influence of communities of color.



Over the years, our work on the frontlines of social change has led us to discover gaps in how the sector approaches sustainable philanthropy. In order to bridge the divide between short-lived social impact and sustained social change, we expanded our offerings to include: **Moore Advisory, Moore Impact, and Moore Investment**. This ensures that Moore Philanthropy has a comprehensive approach towards philanthropy that considers how a giving strategy is developed, how those donations are deployed, as well as and the management of assets to ensure we do not undermine the work of our donors and the communities we both seek to serve.

Our approach supports and encourages our clients to build a deeper and more operational understanding of the diverse people and communities we aim to serve. For us, philanthropy does not start when you decide to make a gift - it starts when you consider how a gift should be made and whether principles of equity, power and inclusion guide your giving.

We invite you to learn more about our company and how our approach towards philanthropy might leverage your giving for impact.

A handwritten signature in black ink that reads "Yvonne Moore". The script is fluid and cursive.

YVONNE L. MOORE
FOUNDER & PRINCIPAL



Moore Philanthropy applies a deep definition of equity to every action that guides our grantmaking and investments. We understand that solving complex problems requires having the right tools. Our philosophy led us to expand and create Moore Advisory, Moore Impact, and Moore Investment.

Moore Advisory connects passionate donors of wealth to solution-oriented changemakers to help solve some of the world's greatest challenges. We work with donors to help them identify and name their values and execute a giving strategy with those goals in mind.

Moore Impact, a 501(c)(3) exempt entity, provides a tax-exempt vehicle that allows donor collaboratives, giving circles, and urgent response funds to accept donations and make grants, both in the U.S. and abroad.

Moore Investment, a program of Moore Impact, allows individuals, families, and institutions to establish a donor-advised fund (DAF) from which they may engage in thoughtful and high impact philanthropic giving. A DAF is a more simplified giving vehicle than a private foundation but still allows individuals and families to engage in consistent and regular giving to those issues and organizations for which they care deeply.

WHAT MAKES US TRUSTED EXPERTS?

Moore Advisory's strength stems from our 25 years of experience navigating the complexities associated with cross-border giving and building trusted relationships with nonprofit organizations around the world.

Whether giving in the U.S. or abroad, we help clients craft their philanthropic vision, reaffirm their giving focus, identify prospective grantee partners, and/or fully manage their family's foundation or giving fund.

According to the 2018 U.S. Trust Study of High Net-Worth Philanthropy¹ 45 percent of wealthy donors reported that their greatest challenge associated with charitable giving is identifying what causes they care about and deciding where to donate.

A recent Stanford study also found that even when advisors wish to engage their clients around their philanthropy, many wealth advisors feel uncomfortable raising the subject.

Advisors tend to steer clients towards the giving vehicle that will ensure the greatest tax benefit at the lowest cost when talking about how to make charitable gifts.² Their expertise in identifying specific tax-exempt organizations to support is absent.

We have vetted and worked with a range of organizations committed to advancing social justice. Because of this, our clients benefit from our deep relationships and knowledge about where and how to give. Moore Advisory has worked with reputable nonprofits including but not limited to Black Women's Blueprint (BWB), Gbowee Peace Foundation Africa, New American Leaders (NAL), and The President's Young Professionals Program (PYPP) of Liberia.



1. This study was conducted in partnership with the Indiana University Lilly Family School of Philanthropy.

2. Roumani, 2018

HOW DO WE WORK WITH MARGINALIZED COMMUNITIES?

Moore Impact recognizes that many social movements and enterprises in their early stages may lack tax-exempt status and have few options to support them in refining their mission, building their organizational structure, and securing funds to sustain their work.³

Despite the altruistic nature of philanthropy, the field has consistently overlooked funding leaders of color who have the most lived experience in the very problems the sector is trying to solve.⁴ The lack of diverse leadership and low levels of funding towards nonprofit leaders of color are clear indicators of the sector's shortcomings.

To address this, Moore Impact serves as a fiscal sponsor that accepts and deploys funds on behalf of time-limited projects and special initiatives that may lack U.S. tax-exempt status. This includes donor collaboratives, giving circles, and urgent response funds. Our ability to serve as a U.S. fiscal sponsor for organizations our clients choose to support is an additional benefit of working with Moore Impact.

By accepting donations and making grants both in the U.S. and abroad, we accelerate grantmaking for communities of color in a responsible and systematic way.



3. Frontline Solutions, 2016

4. Dorsey, Cheryl, et al., 2020

HOW DO WE ENSURE YOUR INVESTMENTS GENERATE A SOCIAL AND FINANCIAL RETURN?

Moore Investment takes pride in investing its assets with diverse-owned firms.

Female and minority underrepresentation is endemic in asset management. Firms owned by minorities and women⁵ manage only 1.1 percent of the industry's total \$71.4 trillion in assets under management.⁶ Meanwhile, a report commissioned by the John S. and James L. Knight Foundation found that diverse-owned funds perform at a level comparable to that of their non-diverse peers.

In 2020, we made the decision to partner with Robasciotti & Philipson, an

investment management firm that is majority owned and operated by women, people of color, and members of the LGBTQ+ community. Robasciotti & Philipson's focus on aligning the investment industry with social justice movements reflects Moore Investment's focus on using social justice criteria to drive decisions in investing and grantmaking.

Our firm provides clients with the option to grow their investments using socially responsible investing principles. We maintain a strict approach towards investing in ways that do not undermine the values of our clients.



5. Based on this report, the definition of "minority" includes racial/ethnic minorities (e.g., Hispanic, Black, Asian, and Native American) but does not include other underrepresented groups such as veterans or disabled persons (Bella Private Markets, 2019).

6. Data on firm ownership are compiled across four asset classes: mutual funds, hedge funds, private equity (PE), and real estate (ibid).

OUR VALUE PROPOSITION

Moore Philanthropy is one of the few Black-owned advisory firms with over 25 years of experience helping donors of wealth develop and execute their philanthropic goals. As a firm led by people of color, we have the lived experience of navigating the very problems philanthropy seeks to solve.

We bring this lens to our services and work closely with our clients to ensure they have a holistic understanding of their philanthropic goals. Our firm also offers a mission-driven approach to capital investment and reinvestment in marginalized communities. As we design solutions for our clients, we are critical and reflective of our own behaviors and remain deliberate in how we incorporate equity and inclusion in the end-to-end processes that govern our work.

Another distinct feature of our firm is its highly experienced leadership and governance team that leverages their professional expertise to execute our approach towards philanthropy. Our investment managers lead with an environmental, social, and governance (ESG) lens and have a proven track

record in social justice and equity investments.

Meaningful, high-impact philanthropy does not happen in silos. It requires a deep understanding of the intersectionality of social problems. At Moore Philanthropy, we are committed to tackling implicit bias in grantmaking and asset management in order to help our clients become responsible financial stewards in their charitable giving.

Our firm brings our operational experience in international and domestic grantmaking and our expertise in identifying and supporting diverse social movements to provide clients with a comprehensive framework for sustainable giving. Diverse perspectives across all aspects of our firm strengthens the philanthropic sector and maximizes the impact of your gift.

Our unapologetic approach towards social change will result in a philanthropy that is responsive, inclusive, equitable, and efficient.

MOORE PHILANTHROPY IS AN S-CORPORATION BASED IN THE STATE OF COLORADO

MOORE IMPACT IS A U.S. 501(C) 3 BASED IN THE STATE OF COLORADO

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SOURCES

[1] "The 2018 U.S. Trust Study of High Net-Worth Philanthropy." Bank of America Private Bank, U.S. Trust and The Indiana University Lilly Family School Of Philanthropy, 2018, www.privatebank.bankofamerica.com/articles/2018-us-trust-study-of-high-net-worth-philanthropy.html.

[2] Roumani, Nadia. "HELPING WEALTH ADVISORS INCREASE PHILANTHROPIC IMPACT FOR HIGH NET WORTH CLIENTS." Stanford University Effective Philanthropy Learning Initiative, 2018.

[3] "Fiscal Sponsorship." Frontline Solutions, 2016.

[4] Dorsey, Cheryl, et al. "Racial Equity and Philanthropy Disparities in Funding for Leaders of Color Leave Impact on the Table." Echoing Green and The Bridgespan Group, May 2020.

[5] Lerner, Josh, et al. "Diverse Asset Management Project Firm Assessment." Bella Research Group and Harvard Business School, May 2017.
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[6] Lerner, Josh, et al. "Diverse Asset Management Project Firm Assessment." Bella Research Group and Harvard Business School, May 2017.
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