Giving Place

The first-ever software solution for optimizing all forms of charitable giving.

When giving gets big, Giving Place lets you manage it all with ease
no matter how a family conducts their giving program. Our software...

REMOVES THE BURDEN
OF ADMINISTERING
CHARITABLE GIFTS

ELIMINATES OBSTACLES
THAT STYMIE THE BEST
INTENTIONS

SIMPLIFIES ALL THE
COMPLEXITY

PROVIDES THE BANDWIDTH
TO THINK BEYOND
ADMINISTRATIVE TASKS

...making philanthropy more accessible, fulfilling, and impactful.

Giving Place provides easy-to-use tools to help you organize, simplify, and strategize across the entire giving process. Our software helps you...

STREAMLINE AND SIMPLIFY ALL TYPES OF CHARITABLE GIVING

GET FASTER ANSWERS TO INFORM BETTER DISCUSSIONS, DECISIONS, AND COLLABORATION

SET GIVING GOALS, TRACK PROGRESS, AND MAKE ADJUSTMENTS WITH REAL-TIME, ACTIONABLE DATA

ACCESS DEEPER VISIBILITY AND EMERGING OPPORTUNITIES TO INSPIRE MORE IMPACTFUL STRATEGIES

AUTOMATE TASKS TO REDUCE WORKLOAD AND RISKS THROUGHOUT THE GIVING PROCESS

LEVERAGE INTEGRATED SEARCH TOOLS AND PARTNERS FOR VALUABLE INFORMATION AND INSIGHTS

Giving Place streamlines and simplifies all types of charitable giving.

View and manage all charitable activity in single portal.

Plan, execute, track and analyze all giving with just one process to learn.

See the big picture view of a family's total chartable activity at a glance – across all family members, financial accounts, and charitable vehicles.

Giving Place gets you faster answers to inform better discussions, decisions and collaboration.

Provide instant access to all relevant documents, notes and contacts stored in just one place.

Track all key task and milestones on a centralized timeline that the whole team can view.

Keep everyone informed and working in lockstep with real-time updates across all giving activity at every stage of the grant life cycle.

Giving Place lets you set giving goals, track progress and make adjustments with real–time actionable data.

Easily create giving plans based on aspirational goals, budgets and required distributions.
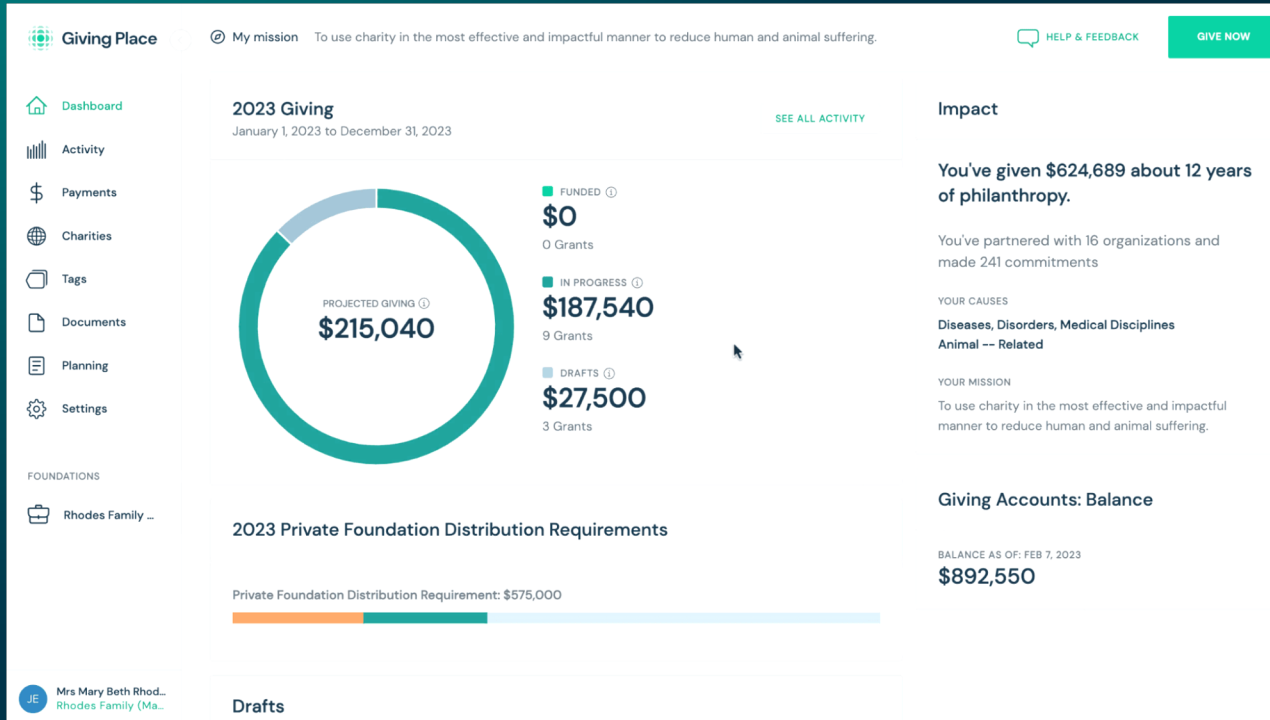
Personalize a view that visualizes how your giving aligns with your causes and the impact it's having.

Track how much you've given in real–time, and how much capacity remains if a relevant charitable opportunity arises.

Giving Place provides deeper visibility and emerging opportunities to inspire more impactful strategies.

Gain full visibility into a family's charitable activity across generations, households, and individuals to spot intersecting interests to support.

See across multiple families' charitable activity to leverage cross-client metrics and benefit from lessons learned.

Connect with emerging impact and social investing opportunities that provide new and innovative ways to strengthen overall charitable impact.

Giving Place automates tasks to reduce workload and risks throughout the giving process.

Ensure donors get deductions and eliminate the tax–time scramble with automated tax prep, audit trail, and grant letter tracking.

Automatically schedule and execute payments, confirm donor approvals and IRS status, and track direct deposits and mailed checks.

Sync with QuickBooks or Sage Intacct to automatically debit donations, reduce human error, and eliminate the need for double entry.

Configure standardized templates to auto-generate grantmaking documents, grant letters, and checks.

Giving Place provides integrated partners and search tools to give you valuable information and insights.

Do due diligence with less doing using a thoughtful curation of charity statistics, financial figures, and public documents.

Generate ad hoc and custom reports and gain a deeper understanding of a family's giving with the only multi-vehicle aggregation platform for charitable activity.

Quickly search charities and discover new ones to support using integrated charitable databases.

Access valuable insights from leading data providers in the charitable space, like GuideStar and Impact Genome.