

## HOW WE WORK WITH PHILANTHROPISTS

### Determine areas of interest and desired impact

- Through a detailed conversation with a Benefunder philanthropy specialist, we determine your areas of interest and goals you wish to accomplish with your research funding.
- By understanding your current giving and philanthropic activities, what has worked and not worked in the past, we align your research funding with your holistic philanthropic strategy.

### Create a proposed portfolio for researcher funding

- With access to the top researchers in any given field, Benefunder will create a proposed portfolio of researchers that match your interests, desired impact, and stage of research that matches your timeline for potential outcomes.
- If desired, we will arrange onsite lab visits or calls with researchers to allow deeper due diligence during the final selection process.

### Develop a detailed Giving Plan

- Upon the final selection of researchers to be funded, a detailed giving plan is created with funding amounts allocated to each researcher based on priorities.
- A distribution schedule will also be finalized and approved.

### Implement funding

- Benefunder will coordinate distributions from DAF's, Private Foundations, and Direct Donations with institutions to ensure funds are directed to specific researchers in accordance with the approved giving plan.
- Benefunder will also ensure gift letters and, where appropriate, tax documentation is properly distributed.

### Ongoing Engagement

- On a regular basis, researchers will send updates from their lab to funders. If desired, follow up lab visits can be arranged.
- Also, you will receive updates from Benefunder as new researchers in a philanthropist's area of interest are added to the Benefunder platform.

### Review progress and impact

- A comprehensive annual review (or more frequently if events warrant) will be conducted to assess progress toward your goals and expectations.
- Adjustments to researchers and funding will be made as requested.