



LEVENTHAL KLINE MANAGEMENT INC.
FOUNDATION & PHILANTHROPIC SERVICES

GIVING WITH CONFIDENCE

Helping You To Make A Difference

**MANAGEMENT AND
ADVISORY SERVICES
FOR PRIVATE FOUNDATIONS**



LKM helps independent and family foundations become more effective, providing donors with greater confidence and satisfaction. Our clients are secure in the knowledge that their foundations are operating in compliance with regulations, and that their grants are working to make a difference to the issues they care about.

THE LKM FOCUS

Professional...Personal

LKM is focused on serving the needs of small to mid-size family and independent foundations - those that are too small to hire staff but need professional support. Unlike on-line "foundation managers" or large trust companies, we serve a small number of clients with highly personalized and custom-designed services that meet their unique needs. We provide just what you need when you need it.

LKM SERVICES

Flexible...Responsive

Because no two foundations have the same needs, LKM's services are individually tailored for each client. Some clients want the comprehensive support and guidance of our full-service approach. Others prefer to engage us for particular functions, such as grant management or financial administration.

We help new foundations build the solid base they need to thrive from the start. We help existing foundations reach their full potential, with engaged board members, a focused philanthropic mission and effective grants.

We help foundations in generational transition bring their administrative processes up to date and craft a grantmaking strategy that honors the founder's legacy while expressing the vision of the next generation.

With LKM, donors are free to focus on their philanthropy. We offer all a private foundation needs to operate efficiently and cost-effectively, and provide smaller foundations with the professional expertise they need to give with impact.



CASE STUDIES A couple with new high tech wealth came to LKM for help in achieving their philanthropic goals. We facilitated the creation of a foundation to express their active involvement in social justice and introduced them to the people and organizations working most effectively in their areas of interest. As their involvement grew, their foundation tripled in size and is now known for its innovative approaches to global issues.

A family foundation created in the 1950's was facing intergenerational succession. The founder had recently passed away and the heirs had been minimally involved in the foundation during the founder's lifetime. LKM helped the heirs take control of the foundation, update its financial recordkeeping and reporting capacities, and design new grantmaking programs that both honor the founder's legacy and reflect the next generation's interests.

SUMMARY OF SERVICES

- Strategic planning and program design to implement the foundation's mission and vision
- Financial management and accounting
- Grantmaking, grant management and evaluation
- Compliance with regulatory and IRS requirements, including preparation of the 990-PF tax return
- Governance support, including organization and facilitation of meetings, preparation of agendas, dockets and minutes, and maintenance of corporate records
- Investment monitoring and liaison with investment advisors
- Facilitating positive relationships with grant recipients, grant seekers and the general public
- Business office services including address, phone, mail handling, web hosting, and meeting space



THE LKM STORY

Harald Leventhal, MBA President

Expert in financial management, administration and compliance for private foundations

Benita Kline, MS Vice President

Expert in philanthropic strategic planning, program development, grantmaking, evaluation and governance for private foundations

Founded in 1998, LKM is a well-established foundation management and philanthropic advisory firm located in the San Francisco Bay Area, with a national client base. We have established a solid reputation for the highest integrity, and are known for our wide-ranging knowledge of the field of philanthropy and our singular dedication to our clients' needs.

Designed to serve family and independent foundations, LKM removes the uncertainty of changing regulations and increasing governmental oversight, and the burden of time consuming paperwork, to enable our clients to enjoy their philanthropy with confidence.

Together with our versatile staff of accounting and administrative personnel, and our wide network of strategic partners, we help clients create the team they need to achieve their goals.



CONTACT US

LEVENTHAL KLINE MANAGEMENT INC.
FOUNDATION & PHILANTHROPIC SERVICES

127 University Avenue
Berkeley, CA 94710

Tel 510-841-4123

Fax 510-841-4093

www.philanthropicadvisor.com

info@lkmi.com

