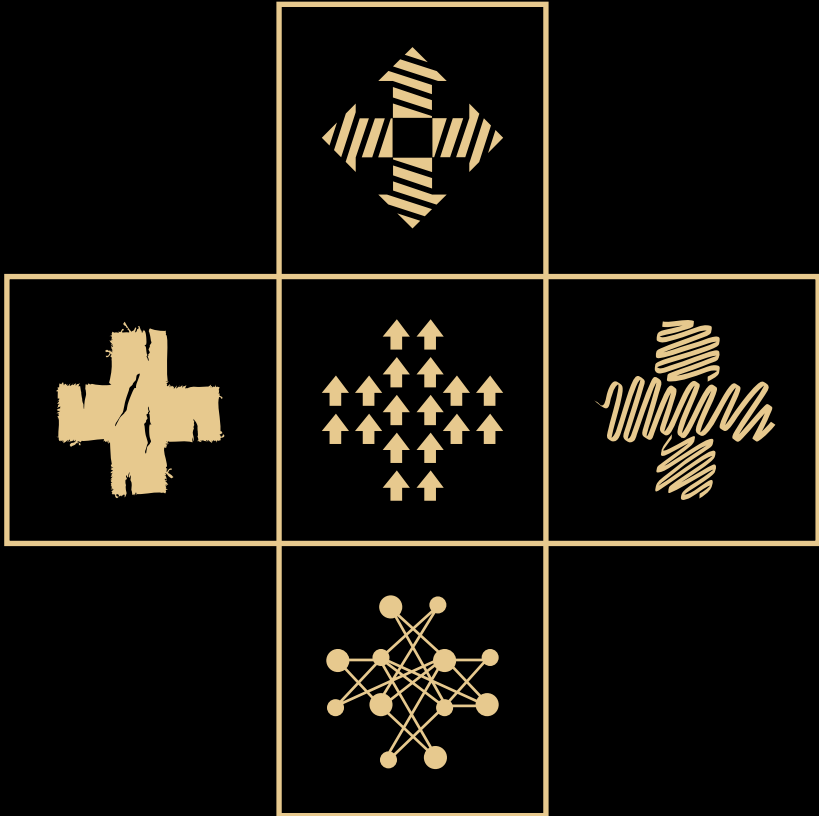




Philanthropy Services



Stewardship⁺

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WE ARE HERE WHEN YOU NEED US

We are trustworthy stewards who have been helping people maximise the impact of their giving for over a century. Our award-winning team of experts will partner with you to provide a personalised service that frees you from the complexities of making larger gifts so you can focus on supporting the causes you are passionate about.

We would love to hear from you.

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Welcome

For over a century we have been helping individuals and families be wise and generous stewards of the resources available to them, during their lifetime and beyond. Our approach is one of partnership, providing specialised and tailored solutions for larger gifts.

Whether you are taking your first exploratory steps into philanthropy, or need help lightening the load, we can help you plot the right path which could take you further than going it alone.

Our team of dedicated experts will work to understand your personal giving aspirations and vision. When trying to give well with maximum impact, the depth and breadth of opportunity can feel overwhelming. We are here to help you navigate those challenges and free you from the burdens of administering your giving.

The following pages introduce you to our team and give you a taste of what we do and how we do it. We would love to hear from you as you consider the next steps on your giving journey.

We look forward to partnering with you.

Nicola Johnson
CHIEF PHILANTHROPY OFFICER



WINNER
Philanthropy Team
of the Year



Whatever your passion or calling, we help connect you to the causes you care about, from Evangelism to the Arts & Media, Church Planting to Tech & Innovation, and everything in between.

Today, we help over 30,000 people live out their calling to be generous stewards, giving more than £100 million each year to over 4,000 churches, 2,300 Christian workers and 6,000 charities.



“Each of you should give what you have decided in your heart to give, not reluctantly or under compulsion, for God loves a cheerful giver. And God is able to bless you abundantly, so that in all things at all times, having all that you need, you will abound in every good work.”

2 CORINTHIANS 9:7-8 (NIV)



Art & Media



Bible



Children & Youth



Church Planting



Creation Care



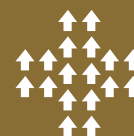
Evangelism



Global Mission



International Aid



Justice



Local Church



Mental &
Physical Health



Prayer &
Worship



Rapid Response



Sports &
Recreation



Tech &
Innovation



UK Poverty
& Debt

Our story

YOU ARE IN GOOD COMPANY

Stewardship was founded over a century ago by a small group of Christians who partnered to release generous gifts and financial support to Christian ministries in the UK and overseas.

Over the last decade, we have enhanced our services to help a growing number of individuals and families with the capacity and calling to make larger gifts.

From technical complexities to the deeply personal and spiritual questions of how much to give and what causes to support, we are uniquely positioned to understand the pressures and issues that can

come with making such decisions. We also bring insight, understanding and knowledge of the churches, charities and individual workers who are on the frontline making an impact.

We understand that Christian philanthropy is more than just a charitable donation. It is a heart matter – a calling to carefully and wisely steward the resources available to you to bring hope and restoration to our local, national and global communities.

“Any temporal possession can be turned into everlasting wealth. Whatever is given to Christ is immediately touched with immortality.”

A. W. TOZER



“ The Stewardship staff have been amazingly supportive and the link has felt very individual and personal.

We used to give using an older non-Christian charity but then friends and mission partners told us about Stewardship as a really helpful Christian platform to use.

When our parents died, we discovered that if you are liable to pay Inheritance Tax, it is an amazingly tax-efficient time to give; you can make a Deed of Variation of the Will and, in our case, for every £6,000 we gave, another £4,000 of tax was added to the fund! So, we put some of our inheritance into a Donor Advised Fund with Stewardship. This saves us from having to do all the legal work of setting up a trust fund and gives us maximum flexibility.

We can pay into the fund and we can allocate giving from the fund whenever we want and to any of the charitable causes supported by Stewardship. Three times now we have wanted to support a mission partner working with an overseas agency and, on each occasion, Stewardship has been able to set up the overseas agency as a recipient of our support. This has been a great help.

Anonymous

Your giving

CREATED JUST FOR YOU

We recognise that each giving journey is unique, so the landscape of our offering is flexible and continually evolving to meet your needs.



“Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up.”

GALATIANS 6:9 (NIV)

As we work with you to support your philanthropic aims, we will tailor a solution to suit your needs, bringing together our suite of bespoke services, team of dedicated in-house experts and wider network of advisers, as well as your own advisers when required.

As partners with Generosity Path, a worldwide Christian network that helps people discover the joy of giving, we are also facilitators for their Journey of Generosity Retreat, which seeks to support and guide people in their giving.

CASE STUDY



“It’s a real joy to see the difference that the money we have can make but also, we have much and to whom much is given much will be required.”

We have had a Donor Advised Fund for about 25 years with Stewardship. We can give in one tax year into the fund and allocate later. We may even wait until after I’ve retired and stopped earning before we allocate some of the money we’ve put into the fund.

Whilst it’s there you can ask Stewardship if they would allocate some of the balance into an investment fund so hopefully over time it would grow with their investment, and it has the advantage that if we die we can tell Stewardship in advance

where we want the money to go and you get a statement once a year.

It’s also quite handy if you want to support charities overseas; there are two tiny charities in Pakistan that if we wanted to give tax-efficiently to it would be a complete administrative nightmare. But Stewardship, for a modest fee, will do the due diligence, enabling us to partner with Stewardship in support of those charities.

It’s been great to have an organisation that has been easy and friendly to deal with and accessible.

Andrew & Kathy



Achieve your giving goals

We will match you with experts on our team who will meet with you to understand your needs. We will offer clear, considered and personal guidance and work with you to create a strategic plan to achieve your philanthropic goals.



Connect to the causes you care about

We gather the information you need to feel confident in your giving decisions.

You can ask us to identify potential new charity partners from our database and wide-reaching networks, evaluate the impact of existing charity partners, or conduct additional research if there are new causes you wish to explore.



Simplify your own charitable foundation

If the administration and compliance for your existing family charitable foundation is becoming a burden, speak to us about transferring this to a Donor Advised Fund or Philanthropy Fund account.



International grant making

For worldwide giving we either arrange this directly or partner with TrustBridge Global, a Swiss foundation focused on building an international member network that allows donors around the world to fund charities of their choice. TrustBridge manages the due diligence to ensure charities are legitimate and able to receive international grants.



Lighten your load

Our team will take care of all the day to day administration of your giving. We will handle everything from incoming gifts of cash, shares and property to grant making and communication with partners, and you will be able to easily keep track of everything we do.



Discretion for you and your family

You can give with confidence knowing that all charity partners are verified against Stewardship's eligibility criteria and reviewed regularly by our team.

When discretion is required we can also make gifts anonymously or under a fund name.



Maximise your giving potential

We will handle your giving tax-effectively, including claiming Gift Aid on cash gifts and accepting tax-efficient gifts of property or shares. We can also enable US/UK dual-qualified giving through our partnership with TrustBridge Global.



Investing your fund

Should you wish to allocate some or all of your account balance for investment before requesting grants, we offer three Stewardship Investment Portfolios. We also provide options for you to nominate alternative investment opportunities.

Giving solutions

TAILORED FOR YOU

Donor Advised Fund

FOR THOSE LOOKING TO GIVE MORE THAN £25,000 PER YEAR

Our Donor Advised Fund is the single place for you to give tax-effectively in support of all the causes you care about. We create a fund for you within Stewardship from which to manage your giving to support charities, churches and individuals in Christian ministry. Leave us to worry about the governance, administration and reporting requirements while you enjoy giving without complications.

Philanthropy Fund

FOR THOSE WHO ARE LOOKING TO SET UP A LONG-TERM FUND, WITH A STARTING GIFT OF £500,000 OR MORE

Our experienced team will work closely with you and your advisers to establish a fund suited to your needs and your preferred way of giving. They will work with you, providing clear, considered and personal guidance and developing and implementing a strategy to help you achieve your philanthropic goals.

“For families wishing to engage with their adult children on the topic of generosity or those wanting to do some serious thinking about how best to structure their range of giving, Stewardship offers excellent support.”

John Riches
RMW LAW LLP

Donor Advisory Board

We can help create and manage a board structure to regularly facilitate input from family, friends or other expert advisers in your grant-making decisions. This is also a perfect option if you are migrating an existing family foundation or charitable trust to Stewardship.

Social Impact Investing

Social impact investment is an innovative approach to philanthropy that entails allocating your account balance to support a charity with a loan or other funding arrangement. Social investment provides long-term capital, which can help your chosen causes to scale up and become more sustainable, for example by providing working capital or by enabling the purchase of assets such as property.

Social impact investment helps your generosity to go further; the investment has the potential to generate a return to your account that can then be ‘recycled’ into further social investments or grants.

Legacy & Estate Giving

We are committed to ensuring you have full peace of mind when it comes to succession planning and any arrangements you may wish to make for gifts in your will as part of your estate planning. We can engage wider family members as part of our service, as you choose, and provide additional support for those wishing to coach and support emerging generations to start their own journeys of generosity.

Research Services

To help measure and improve the impact of your giving, we are delighted to partner with Eido Research. Eido is a team of impact researchers who specialise in working with Christian organisations. Their research will shed light on the impact of your giving, enabling you to have confidence in its effectiveness today and guide your decision-making tomorrow. Not only will their input strengthen your own giving but you will also play a part in building a base of knowledge that will enable the Christian sector to maximise the value it adds to society.

Giving partnership

PARTNERING WITH YOU FOR IMPACT

It is our privilege to serve a growing community who trust us to actively manage incoming gifts from £25k to over £25m each year, and to safely and responsibly distribute over £80m to churches, charities and Christian workers at their request.

We actively manage around £97m of charitable funds across pooled, nominated and social investment portfolios.



“Philanthropists are often cash or asset rich but time poor and need professionals to smooth the path for them, as they do in their businesses. The intellectual capital within Stewardship makes them ideal partners in this journey. Clients I know who have met them have come away impressed and, as a wealth manager, I find them very easy to deal with.”

James Ward

INVESTMENT DIRECTOR,
RATHBONE GROUP PLC AND
STEWARDSHIP TRUSTEE

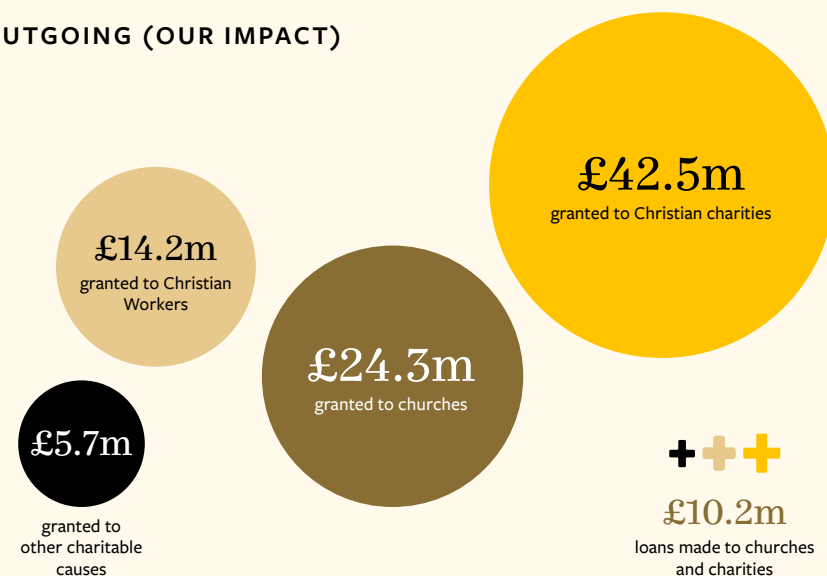
2021: The year in numbers

In 2021 we were trusted by our clients and partners to safely and wisely steward more financial resources than even before, for the glory of God.

INCOMING



OUTGOING (OUR IMPACT)



Numbers taken from Stewardship's Annual Report and Accounts 2021.

Your first 3 steps

1

Discover

Our partnership begins by understanding you. During an initial consultation, a dedicated member of our team will listen to your goals, values and passions, and suggest ways we could help you on your journey.

2

Plan

We will work with you to develop, refine or revise a strategic plan to achieve your philanthropic goals. We will then provide you with a proposal that will help drive the impact you want to achieve.

3

Deliver

We will help implement your vision and provide the support you need to manage your giving. We will also track the effectiveness of your giving strategies, making adjustments as necessary while continually evaluating and supporting your long-term plan.

“But who am I, and who are my people, that we should be able to give as generously as this? Everything comes from you, and we have given you only what comes from your hand.”

1 CHRONICLES 29:14

CASE STUDY

“Why do we give? Because it all belongs to God anyway (1 Chronicles 29:14)!”

We first started to partner with Stewardship when we became higher rate taxpayers. Organising all our giving using our Donor Advised Fund makes it easy to find the numbers we need for our tax return and to reclaim our higher rate Gift Aid. The deduction that Stewardship takes helps to support Stewardship’s mission of strengthening churches and charities and encouraging active generosity.

As we’ve gone on in our careers, our income has increased but also become more lumpy and unpredictable. We make a monthly gift to Stewardship by direct debit and in

addition we usually make a one-off gift just before the end of each tax year, once we know what our income for that year will be. We use our Donor Advised Fund to turn this lumpy giving into committed monthly support for our chosen causes, as well as a balance we keep ready to support one-off or emergency appeals.

Our Stewardship Donor Advised Fund helps us to give in a way which is both thoughtful and joyful and we’d recommend it to others who’d like to take a more intentional approach to their generosity.

Anonymous

Responsive giving

PARTNERING WITH YOU FOR IMPACT

Our Rapid Response initiative brings together our community of givers to serve global humanitarian emergency situations.



We launched our first Rapid Response Fund in 2020, as the UK entered its first lockdown of the Covid-19 pandemic. The aim was to help churches and Christian charities adapt and innovate to bring hope and transformation during this crisis.

In 100 days, we helped over 50 individuals, families and trusts to create and distribute almost £5m to 88 organisations within our extensive network of reviewed and approved partners throughout the UK.

Our second Rapid Response Fund was in response to the Ukraine war; we helped to raise £1.5m and launch the Sanctuary Foundation for refugees coming to the UK.

The focus of our third appeal is on raising critical funds to support churches and charities on the frontline of the cost-of-living crisis.

We are always active on your behalf.



CASE STUDY

“We were so pleased to sit down with the team from Stewardship and know that we didn’t have to face all these challenges alone.

Deciding to sell our business was the easy part – deciding how much of the proceeds to give and working out the most efficient way to do so was very stressful.

After an introduction from a friend, we were so pleased to sit down with the team from Stewardship and know that we didn’t have to face all these challenges alone.

Their team of specialist advisers helped us explore our options to make sure the effectiveness of our gift was maximised, while the whole team took the time to understand our hopes and fears, introduce us to others who had been in our situation, and worked with us to establish a strategy for our giving.”

Anonymous

Stewardship's mission is to connect and serve Christian givers, workers, charities and churches in the UK and beyond to create Kingdom impact.

We do this by partnering with people to help them build, donate to and fundraise for the causes they are passionate about.

We call this
*active
generosity.*

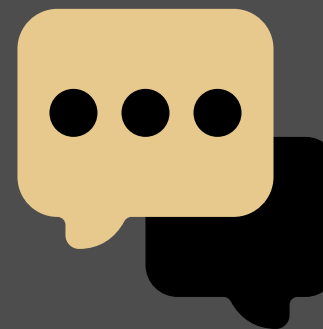
Our partners

Eido
RESEARCH



 **TrustBridge**
global

Start your journey with us



Our first step together is to arrange an initial consultation or visit to discuss your philanthropic needs.

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Stewardship is not authorised or regulated by the Financial Conduct Authority and does not provide investment advice or recommendations in relation to investments. Any conversations held with you, or information provided to you, will only be in relation to your donated, or to-be donated, funds and does not constitute a recommendation or advice in relation to funds you may have outside of Stewardship. If you do require financial advice, you will need to consult a regulated financial adviser.

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