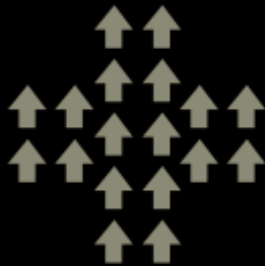




Philanthropy Services



Welcome

For over a century we have been providing specialised and tailored solutions to help individuals and families make larger gifts and to be wise and generous stewards of the resources available to them, during their lifetime and beyond.

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

Wherever you are on your journey, we're here to help when you need us.

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're 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'd 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

We're here when you need us

As a trusted advisor to Christian philanthropists since 1906, our personalised service is here to free you from the complexities of making larger gifts and to partner with you to maximise the impact of your giving.

We'd love to hear from you.

Whatever your passion or calling, we help connect you to the causes you care about. From Evangelism to the Arts and Media, Church Planting to Tech and Innovation, and everything in between, we help over 30,000 people give more than £80 million each year.



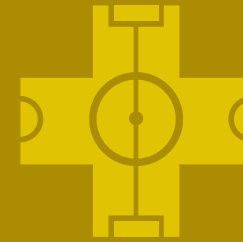
Prayer & Worship



Physical & Mental Health



Bible



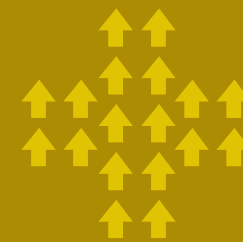
Sport & Recreation



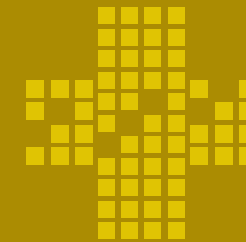
Creation Care



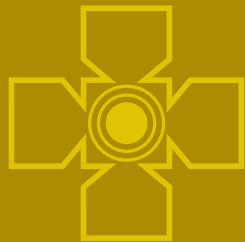
Local Church



Justice



Tech & Innovation



Arts & Media



Youth & Children



UK Poverty



International Aid



Evangelism



Global Mission



Church Planting

Our story

YOU'RE IN GOOD COMPANY

In 1906, Stewardship was established by a group of Christian philanthropists, church planters and evangelists to steward generous gifts and financial support to Christian ministries in the UK and overseas.

Our methods have changed but our mission remains the same. Over the last decade, we have enhanced these 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 and whom to give to, we are uniquely positioned to understand the pressures and issues that can come with making such gifts. We also bring insight, understanding and knowledge of the churches, charities and individual workers who are on the front-line making an impact.

We understand that Christian philanthropy is more than just a charitable donation. It's 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.

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 advisors helped us explore our options to make sure we got the best value from our gift, 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.”

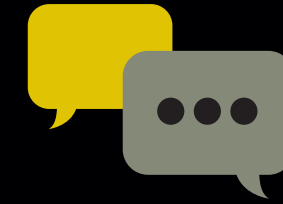
Anonymous

Your giving

CREATED JUST FOR YOU

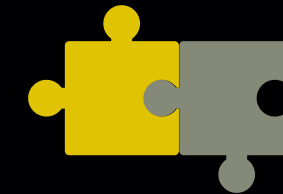
We recognise that each giving journey is unique, so the landscape of our offering is flexible and continually evolving to meet your needs.

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 experts and wider network of advisors, as well as your own advisors when required.



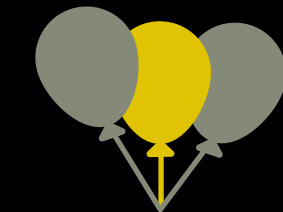
ACHIEVE YOUR GIVING GOALS

We'll 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 recipients from our database and wide-reaching networks, evaluate the impact of existing recipients, or conduct additional research if there are new causes you wish to explore.



LIGHTEN YOUR LOAD

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



DISCRETION FOR YOU AND YOUR FAMILY

You can give with confidence knowing that all recipients are verified against Stewardship's eligibility criteria and reviewed regularly by our team. When discretion is required we can also make gifts under a fund name or totally anonymously.



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.



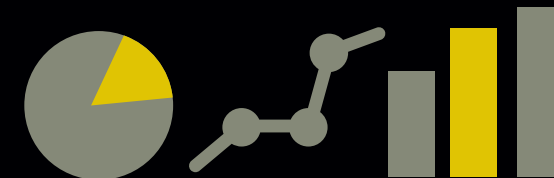
INTERNATIONAL GRANTMAKING

For global giving we work with TrustBridge Global, a Swiss foundation focused on building a growing global 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. We are delighted to partner with them in this work.



MAXIMISE YOUR GIVING POTENTIAL

We'll handle your giving tax-effectively; this can include the use of our UK/US dual-qualified Donor Advised Fund and a range of complex non-cash giving, including gifts of property and gifts of shares. All legal obligations and reporting requirements will fall to Stewardship and we will provide your tax advisors with the information they need to manage your tax reporting.



INVESTING YOUR FUND

Part of working together can involve the investment of your balance whilst it is in our care. We offer traditional financial investment options, dynamic social investment options for Kingdom impact, or provide options for you to nominate alternative investment opportunities.

TESTIMONIAL

“The range of support Stewardship can offer Christian families looking to focus on Kingdom Giving is very impressive.”

“I have worked extensively with Stewardship and, in particular, the Philanthropy Services Team in recent years. They combine the knowledge of their subject with a friendly and proactive mindset.

I particularly like their ‘can do’ culture.

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,

they offer excellent support. Their Donor Advised Fund model is also a very helpful alternative for families thinking about their own charitable foundation.

The range of support they can offer Christian families looking to focus on Kingdom giving is very impressive.”

John Riches,
RMW Law LLP

Giving solutions

TAILORED FOR YOU

Donor Advised Fund

Our Donor Advised Fund is the single place for you to give tax-effectively to all the causes you care about. We create a fund for you within Stewardship from which to manage your giving to charities, churches and individuals in Christian ministry. Leave us to worry about the governance, administration and reporting requirements while you enjoy giving without complications. The Donor Advised Fund is for those looking to give more than £25,000 per year.

Philanthropy Fund

The Philanthropy Fund is 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 advisors 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.

Stewardship America

If you have tax liabilities both in the US and the UK and want to make a difference to the causes close to your heart, Stewardship America enables you to give with the benefit of tax relief in both countries. Your gifts could qualify for UK Gift Aid, increasing the value of any gifts made by 25%, and also qualify for a deduction from your US taxable income at your marginal rate, where applicable.

TAILORED FOR YOU

Donor Advisory Board

If you appreciate wider input on your giving decisions, we can help create and manage a board structure to regularly involve family, friends or other expert advisors on grant-making decisions. Also a perfect option if you are migrating an existing family foundation or charitable trust to Stewardship.

Legacy & Estate Giving

We're 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.

Social Impact Investing

Sound financial investing of funds comes as standard, but for those looking for more, we regularly develop new and innovative ways to manage, grow and release resources for Christian work in the UK and overseas. We pioneered social impact investing through our own lending product for churches and continue to offer new opportunities to invest fund balances to achieve financial, social and spiritual returns.



“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)

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

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 on their behalf.

We actively manage around £60m of charitable funds across pooled, nominated and social investment portfolios.

In 2020, during the first 100 days of lockdown, we helped over 50 individuals, families and trusts to collaborate and distribute almost £5m to 88 churches and charities responding with hope in the early days of the Covid-19 pandemic.



RAPID RESPONSE FUND IMPACT ASSESSMENT

2.8 million meals provided to vulnerable communities	729 people have become debt free
1,000 families in financial crisis provided with food, toiletries, and household essentials	32,000 bibles delivered to prison residents in 133 prisons across the UK
500 professions of faith in Jesus	3,000 students connected with Christian Union at their universities

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

3

DELIVER

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

Your team

Whether you are new to philanthropy or are looking to do more with your giving, our team are here to help you move forward on your philanthropic journey.



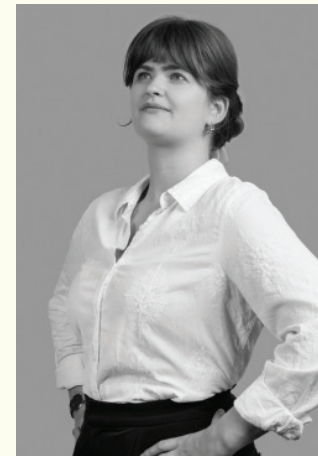
Nicola Johnson
Chief Philanthropy Officer



Nicola has led Stewardship's major donor activities since 2010 and oversees £130m in charitable funds each year, on behalf of 600 clients. In 2020, under her leadership, the Philanthropy Services Team were winners of the STEP Private Client Awards for 'Philanthropy Team of the Year'. Together with her team, she seeks to serve generous philanthropists with expertise and authenticity, to enable them to release funds to the causes of their hearts in the most effective way possible.

Nicola and her husband, Mark, belong to a small Anglican church in rural Essex and together, they are passionate about Creation Care and the environment, Justice and care for the vulnerable, and generosity through hospitality.

Nicola is part of the senior Leadership Team at Stewardship and is also a trained facilitator of the Generosity Path's 'Journey of Generosity' retreat.



Rhian Canning
Head of Client Operations
– Philanthropy

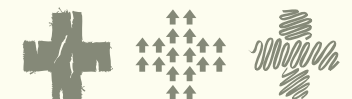


Since joining our ranks in 2015, Rhian has been involved in various facets of Stewardship's mission and now focuses exclusively on Philanthropy Services. She enjoys being busy behind the scenes of the impactful and strategic generosity of our clients. Rhian and her husband, Tomas, worship at a church local to them in South East London.

Rhian loves supporting causes related to Youth and Children, and Justice.



Hannah Gibney
Head of Growth and
Relationships – Philanthropy



Hannah joined the Philanthropy Services Team in 2019 to help reach out to new and emerging philanthropists. Her previous roles have been in the Christian and secular spheres and she is passionate about seeing people released into the fullness that God has for them.

She loves working in a team where its primary aim is to help people experience freedom through generosity.

She lives and worships in Bristol at Christ Church Clifton and is concerned about Justice and Children and Youth.

Your team



Sam Hall
Account Manager



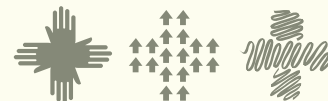
Sam joined Stewardship in 2015 after finishing a degree in International Development at the University of Northampton. As a Philanthropy Account Manager, he works with clients to provide support and advice in meeting the more complex aspects of giving.

Sam supports charities that use football to resolve conflict as well as international development charities aiming to end poverty around the world.

He is deeply committed to causes in International Aid, Sport and Recreation, and Physical & Mental health.



Desirée Joseph
Account Manager



Desirée joined Stewardship in 2021 after finishing a degree in Human Geography. She loves being part of a team that facilitates generosity that will have a lasting impact across the world.

Desirée serves on the Young Adults team at her church in central London. She is passionate about International Aid, Justice, Children and Youth.



Julia Loveless
Communication and
Events Executive



Julia supports the Philanthropy Services team in finding bigger and better ways to serve clients and donors. She loves the challenge of a big project and previously organised and ran the Big Church Day Out as their Events Executive. She lives in Bristol where she attends Christ Church Clifton.

Music and worship are her core passions which she shares by writing songs and leading the worship team at her church. Julia supports people working in the performing arts, prayer and worship and finding creative ways to make the bible more accessible for all.



Amelia Leadley
Account Manager



Amelia joined Stewardship in 2016, as part of the Giving Services Team. After a brief change of career (cut short by the pandemic) training as an Outdoor Activity Instructor, she was delighted to return to Stewardship and joined the Philanthropy Services Team in July 2021. She loves being part of a collaborative team, using their different gifts and skills to assist people with their charitable giving.

Amelia lives in Bristol and is passionate about adventurous activities in her spare time, whilst exploring parts of the South West that she hasn't yet discovered. She is passionate about the Local Church and those doing work in the Mental & Physical Health sector.

Your team



Suzanne Maurice
Account Manager



Suzanne joined Stewardship in 2018 as the Executive Assistant to the CEO and Leadership Team. Now, she works with Philanthropy Fund and Stewardship America clients and loves serving on a team that facilitates generosity.

Suzanne and her husband, Ben, worship at a local evangelical church in Woodford where she serves on the Kids Team.

She is passionate about Evangelism and Children and Youth and supports charities that help children in deprived areas.



Richard Salmon
Grants Advisor



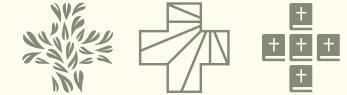
Richard joined Stewardship in 2020 and is enjoying connecting Philanthropy Services Team clients with potential grant recipients and also helping to develop Donor Advisory Boards. He brings a wide range of experience from previous roles, including serving as an Assistant Minister, Regional Director in a Lloyd's insurance broking firm and, most recently, Head of Fundraising and Alumni Relations for a school.

Richard and his wife, Anna, are part of a community church in Bishop's Stortford, where he helps to lead a small group and the Alpha course.

Causes that Richard cares about include the Local Church and its impact within the community, Evangelism and outreach, and Children and Youth.



Rachel Steeden
Head of Legal
– Philanthropy



Rachel is a solicitor with 15 years' experience advising private clients and charities. She enjoys working closely with clients and their advisors to help donors make complex gifts effectively and tax-efficiently. Rachel is a member of the Charity Law Association, STEP Special Interest Group for Philanthropy, Lawyers in Charities and Lawyers' Christian Fellowship.

Rachel and her husband Derek lead a Bible study group for internationals at their church in central London. They're passionate about Church Planting in the UK and overseas, Bible translation and The Local Church.

“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)

Your team



Wai Yee Tsang
Investment Manager



Wai Yee joined Stewardship as Investment Manager in June 2021. She has 20 years of experience in financial services, training as a chartered accountant at Deloitte, and has broad ranging investment knowledge from her roles with Blackrock and Invesco. She is working with the CFO to develop the investment strategy at Stewardship and optimising the use of balance sheet capital to invest responsibly and with impact. Wai Yee is particularly excited about the potential for investments to not only generate financial returns that can further Kingdom causes, but also the positive change that can be enabled through investments that have a strong Kingdom impact.

She works closely with the Philanthropy Services Team to engage with our clients on our investment options, and provide insight and transparency on our investment approach.

Wai Yee is based in London and attends an Elim Pentecostal Church. She is passionate about the Local Church, Bible teaching and Global Mission.

“Whatever your goal, as a trusted advisor to Christian philanthropists, our personalised service can help you maximise the impact of your gift.”

Nicola Johnson – Chief Philanthropy Officer

CASE STUDY



“Stewardship listen to our perspective, our context, to the challenges we face as philanthropists.”

“ We have found ourselves on the cusp of the innovation curve in Stewardship’s own journey, and have been very fortunate therefore to partner with them and to act as a willing ‘test case’ as we have collectively explored what active, radical generosity could and should look like in the Christian sphere.

From retreats to international philanthropy research trips, from creative and specialised

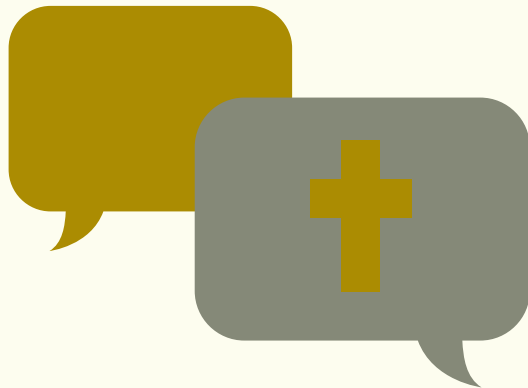
funding and investment structures to rapid collaborative giving responses in the face of Covid-19, the Philanthropy Services team have embraced us into their community.

They listen to our perspective, our context, to the challenges we face as philanthropists, and seek collaborative solutions to unlock funding for the building of God’s Kingdom here on earth.”

Anonymous

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.org.uk/philanthropy

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Our Partners

Eido
RESEARCH



 **TrustBridge**
global

Responsive giving

PARTNERING WITH YOU FOR IMPACT



In 2020, as the UK entered lockdown, we launched our first Rapid Response Fund to help churches and Christian charities adapt and innovate to bring hope and transformation during the early days of the Covid-19 pandemic.

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.

We are always active on your behalf.

Active generosity

Stewardship is here to help the Christian community in the UK to give and receive. We enable our clients to manage their giving, helping them to effectively support the causes they are closest to and inspiring them to connect with a world of Christian philanthropy and create positive change, in Jesus' name.

We call this Active Generosity.



Stewardship

Stewardship is the operating name of Stewardship Services (UKET) Limited. Established in 1906. Registered charity no. 234714, and a company limited by guarantee, registered in England no. 90305. Registered office: 1 Lamb's Passage, London EC1Y 8AB