

Wealth in Focus

Letter from the Editor

Navigating the diverse world of philanthropy can be a complex undertaking, especially as the landscape continuously evolves to incorporate more socially responsible and diversified strategies. This month, we highlight the areas capturing the attention of next-gen donors, family foundations, and philanthropists at large — from governance and social justice to impact investing and innovative philanthropic vehicles.

Don't miss our in-house podcast with Sharilyn Hale, where we take a deep dive into the motivations and methods behind philanthropy. Hale's insights are not only thought-provoking but also actionable for anyone interested in making a lasting impact.

In this month's edition, we're proud to feature our new and improved Wealth Workbook—a must-have resource for anyone looking to jumpstart conversations about stewarding wealth.



Featured Resource

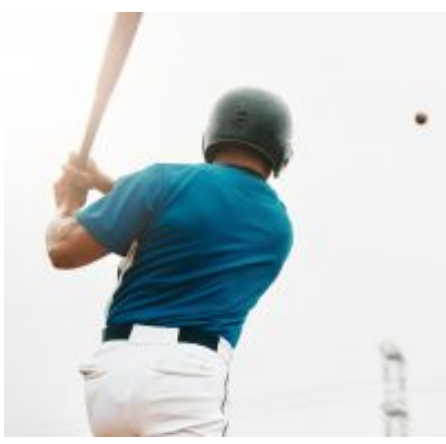
Podcast: Using Governance to Guide Family Philanthropy

In this episode of the Tamarind Learning podcast, we dive deep into the world of family philanthropy with Dr. Sharilyn Hale. Sharilyn offers practical advice on crafting governance plans that reflect the unique goals and structures of your family, emphasizing that philanthropy is not just an act but a journey. From clarifying purposes to creating a plan, this conversation provides invaluable insights for families at any stage of their philanthropic endeavors. Tune in for an inspirational guide to making a difference in the community while strengthening family bonds.



[Listen Now!](#)

Philanthropy Unpacked



Starting Your Philanthropic Journey: Exploring, Experimenting, Swinging for the Fences

Starting a philanthropic journey involves a series of stages from initial exploration to achieving large-scale impact. The article provides a roadmap for those in various phases of giving, advising on how to be strategic, avoid common pitfalls, and collaborate effectively for greater results. It's a must-read for donors looking to elevate their philanthropic endeavors.

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Building the Board Your Foundation Deserves: The Governance Checklist

Family foundations often focus first on grantmaking and investment, but what about governance? NCFP Founder Ginny Esposito introduces a roadmap to building a board your foundation deserves. Covering key areas like board composition, assessment, and decision-making, this guide ensures you're asking the right governance questions from the start.

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Upcoming Event

Institute for Family Governance Miami Conference 2023

Tamarind Learning founder and Chief Learning Officer, Dr. Kirby Rosplock, will be speaking at the Institute for Family Governance Miami Conference, December 7th, 2023!

If you would like to join us, use the promo code **KIRBY** to register at the IFG member rate.

[>> See Agenda](#)



Moving Money and Shifting Power for Social Justice: Voices of Wealthy Next-Gen Donors

Shifting the paradigm in philanthropy, a new report shines a light on high-net-worth Millennial and Gen Z donors committed to social justice. With a focus on wealthy, predominantly female donors who often identify as queer or part of the LGBTQ+ community, the study from the Women's Philanthropy Institute dives into the motivations, behaviors, and challenges of this understudied group. The report serves as a vital resource for anyone looking to understand and grow social justice giving among younger generations.

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Philanthropist's Field Guide: Financial Capital's Versatility in Philanthropy

Philanthropy extends beyond just writing checks. This article outlines innovative approaches, including impact investing and political contributions, to leverage your entire financial portfolio for social good. Learn how to maximize your impact by diversifying your philanthropic activities.

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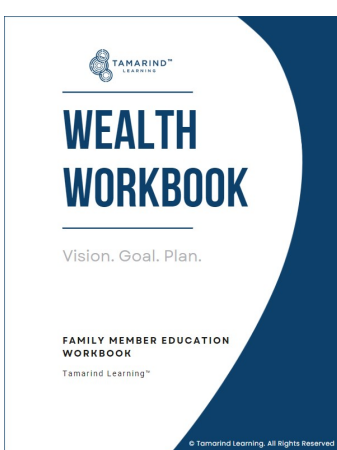
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Tamarind Learning Resources

Our new and improved Wealth Workbook is designed to be used by trust beneficiaries, inheritors, and multi-generational families to:

- Clarify vision by exploring hopes, dreams, and desires
- Examine the impact of wealth on identity
- Set actionable learning goals for personal growth



Download now and gain exclusive access to training videos for tailored 1:1 or group activities.

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Editorial Mission: To provide monthly news, education, and professional guidance that help families, advisors, and trustees become extraordinary stewards of wealth.



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