

PROJECT SPECIFICATIONS
Donor Portfolios & Investment Strategy

PREPARED BY:

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FIRM:

mach73
Architects in >Philanthropy

Engineered. Driven. Smart.

TRANSITIONING TO INVESTMENT-GRADE IMPACT

Most high-capacity giving is **transactional**—reactive responses to appeals rather than proactive investments in change. At **mach73**, we believe philanthropy should be as precisely engineered as your financial portfolio.

As **Architects in Philanthropy**, we assist donors, family offices, and wealth advisors in moving beyond the "donation" to create a **Legacy of Impact**.

Our Specifications are designed to:

- Identify your proprietary "**Values Signature**."
- Vet organizations for **Structural Integrity** before you invest.
- Monitor the **ROI (Return on Impact)** of your total philanthropic portfolio.

1.0 THE PHILANTHROPY SPECIALIST

(Advisory & Estate Integration)

We work alongside your wealth advisors, attorneys, and estate planners to ensure your philanthropic goals are woven into your overall financial architecture.

SCOPE OF WORK:

- **Estate Blueprinting:** Integrating charitable vehicles (DAFs, Private Foundations, etc.) into your long-term legacy plan.
- **Values Discovery:** A facilitated process to define the specific social "terrains" where you want to move the needle.
- **Intergenerational Architecture:** Preparing the next generation of your family to steward the portfolio with the same precision and passion as the founder.

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2.0 SITE DISCOVERY & STRUCTURAL VETTING

(Organization Identification & Due Diligence)

Don't invest in a mission that has a failing chassis. We perform the "Site Inspections" on potential beneficiaries so you don't have to.

SCOPE OF WORK:

- **Mission Mapping:** Direct discovery of NFP organizations that align perfectly with your defined **Values Signature**.
- **Structural Integrity Audits:** We apply the **mach73 Stress Test** to potential recipients, evaluating their governance, financial reserves, and operational RPMs.
- **Vetting Reports:** Detailed "Project Specs" on each organization, highlighting their capacity for growth and their specific "Acceleration Needs."

3.0 PORTFOLIO PERFORMANCE MONITORING

(Ongoing Stewardship & ROI Audits)

A high-performance portfolio requires constant tuning. We provide independent oversight to ensure your investments are being used to drive real, measurable change.

SCOPE OF WORK:

- **Impact Audits:** We move beyond "feel-good" stories to analyze the actual metrics and outcomes of your supported organizations.
- **Stewardship Verification:** Confirming that your "Fuel" (Donations) is being used specifically as intended and according to the agreed-upon roadmap.
- **Annual ROI Summary:** A comprehensive "Gauges & Metrics" report for your total portfolio, showing the cumulative impact of your philanthropic investments.

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ENGINEERED FOR EXCLUSIVITY

Because every donor's portfolio is unique, our engagements are tailored to the scale of your philanthropic vision.

MODELS OF ENGAGEMENT:

- **Project-Based Vetting:** High-intensity due diligence on a specific organization or capital campaign.
- **Strategic Advisory:** Retainer-based partnership for ongoing portfolio management and wealth advisor collaboration.
- **The Architect's Retainer:** Direct access to Gary Cates for high-level philanthropic consulting and legacy planning.

REQUEST AN INVESTMENT CONSULTATION

Shift from transactional giving to transformational impact. Contact the Architect's office to begin designing your philanthropic legacy.

Gary Cates

Philanthropy Architect

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