What difference do you want to make?

wise
philanthropy advisors

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Giving our time or money plays a significant part in all of our lives. To quote Winston Churchill, "We make a living by what we get, we make a life by what we give." Empathy, generosity, philanthropy.

What difference do you want to make? How do you go about it? How do you determine where, in an increasingly complex world, your contribution will make a meaningful impact?

Over the years, we have been fortunate to work with countless individuals, families, family businesses, and foundations that are passionate about philanthropy. They have shown us that, while the reasons for giving are essentially personal, the means to do so have become much more diverse and professionalized in recent years.

As experts in philanthropy since 2004, we are at your side on every stage of your journey. We help you define your mission and strategy, allocate grants, and maximize your impact on the ground. To ensure that the mark you leave makes the difference.

Sincerely,

Etienne Eichenberger & Maurice Machenbaum
Co-founders of WISE – philanthropy advisors

What WISE offers is true professionalism. All too often, philanthropy tends to be equated with good intentions and a backpack. But when we visit projects with WISE, we realize that philanthropy is far too important to be managed amateurishly.

Thierry Mauvernay
Fondation Philanthropique Next, Lausanne

WISE in 5 words

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Active in philanthropy since 1994, we founded WISE in 2004. Our highly motivated, professional team has the expertise to deliver successful philanthropic projects.

Our business model ensures our independence, so that we can focus on your needs. Our diversified client base, and the fact that the company is fully owned by its two partners, mean we have complete freedom when choosing projects and making decisions.

A key part of our success is our integrity, which has earned us our clients' trust. We work closely with you, advising you in a transparent, personalized way to define a strategy that is both realistic and true to your vision. We keep you fully informed about the impact achieved by your grants.

We are known for the quality and rigor of our processes and our interpersonal skills. Our mission is to help you determine where your philanthropy will have the greatest impact – for the final beneficiaries, for partner organizations, and for you and your family.

Our bespoke services are tailored to your needs. Whether you are just starting out or have years of experience, we can help you develop a strategy that optimizes both the impact of your grants and the rewards for you. We take the time to get to know you so that we can advise you wisely on how to make the difference you desire.

Expertise

Professional, reliable, and pragmatic, the WISE team applied their expertise to helping us improve our evaluation process.

Dominique Lemaistre
Fondation de France, Paris

As one of the first companies of its kind, WISE is recognized as a key player in Europe and Asia. In the words of the director of a corporate foundation, "The way in which WISE delivers their advice – quickly, warmly, and discreetly – makes it especially valuable." Our team combines relevant expertise with strong interpersonal skills.

Building on years of experience on the ground on every continent, WISE's founders, permanent staff, and local experts work together to identify high-impact projects and organizations with the potential to successfully implement your vision. Our sophisticated processes and hands-on expertise ensure that your grants are used effectively.

"Rather than a particular service, what I appreciated most about WISE is their extensive knowledge of philanthropy and the fact that they are so well respected by their peers. I found the breadth of their experience and the quality of the relationships they have built over the years to be a real asset," says a family governance advisor.

Neema* presents her homemade tomato sauce in the Iringa region of Tanzania. Thanks to targeted support from a private foundation, 320 young adults like her have found stable employment that brings in a regular income, enabling 3,620 at-risk children to remain in education.

*not her real name

Independence

In a rather hermetic and specialized world, WISE has been successful over the long term thanks to its rare capacity for advising clients without being influenced by what everyone else is doing, and their skill for tactfully offering advice.

Philippe Depoorter
Banque de Luxembourg, Luxembourg

Interview with Etienne Eichenberger

Is there a minimum amount you have to give to be considered a philanthropist?
No. The needs always far exceed the available resources. We believe the central issue in philanthropy today is "how to give better" to achieve maximum impact.

What is WISE's added value?
Our expertise and independence. Listening to clients with an open mind is a crucial first step. It enables us to build trust and identify the causes they care about deeply. We help donors develop a rigorous – but never rigid – approach to philanthropy. We help them make a tangible impact through their personal contributions.

How do you guarantee your independence?
From the start, we realized that we needed to diversify our client base to be successful long-term. The fact that we are paid by our clients on a fee-for-service basis, rather than on a percentage of grants, means we remain independent from the organizations and social enterprises we work with. We are therefore free to choose or suggest projects as we see fit. In addition, we are not exclusively affiliated with any financial institutions. Finally, the two partners are also the sole owners of the company.

How is the company structured?
Maurice and I founded WISE in 2004 and continue to manage it with an entrepreneurial spirit, allowing us to make decisions quickly. We have an expert team in Geneva and work with a broad network of advisors on the ground. In 2011, we opened a regional office in Asia.

Who are your clients and partners?
Our clients include individuals, families, family-run businesses, and foundations. We also partner with institutions and professionals that serve our clients, such as family offices, wealth managers, tax advisors, and lawyers. Our independence and integrity facilitate lasting relationships with our clients and partners alike.

Laís, Otávio and Talita*, along with 160 other young people from the favelas of São Paulo, practice the skills they have learned during a culinary training course. In a few months, they will be placed in jobs in one of the 30 partner companies of this project. Some will train to become trainers for their peers.

*not their real names

Trust

Exemplary professionals who listen closely to donors' wishes – their expertise in philanthropy is unrivalled.

Claude Demole
Albatros Foundation, Geneva

Our mission is to help you find *your* way to make the difference. How you choose to do so reflects your experience and your time of life.

You may choose to set up your own foundation, join an existing structure, or make direct grants. You may opt to make an individual grant or to involve your family and the next generation in a project centred on shared values. Your goal may be to enable innovative projects or simply to ensure that your grant reaches the final beneficiaries.

Whatever you choose to do, we help you effectively use all your resources, not just your capital. Your time, your ideas, and your connections are also valuable assets. As one of our clients, a businessman who takes an active role in running his foundation, explained: "I cannot imagine philanthropy without some form of personal involvement. Investing your own time is part of the process. The personal rewards make the investment worthwhile."

Enjoying the journey is all part of the adventure. That is why we facilitate meetings with social entrepreneurs and beneficiaries, and help you get the next generation involved, if that is what you wish. We share with you the experience and stories we have gathered over the years in every corner of the world.

We have decided to remain a human-sized organization because we value lasting, trusted partnerships with clients.

Like his 170 new friends, Cherabel,* a young boy from a refugee family in Beiruth, Lebanon, attends remedial classes to facilitate his integration in the Lebanese public school system.

*not his real name

Impact

WISE's knowledge, expertise, and on-the-ground support are invaluable to any individual or family looking to make a real lasting impact.

Lana Ojjeh
Private donor, London

"Promise less and deliver more" is how Maurice Machenbaum, co-founder of WISE, describes the company culture. The traditional Swiss values of conscientiousness and excellence are essential to delivering philanthropic projects that make the difference.

What is special about WISE's approach on the ground?
We emphasize building relationships with clients, and with non-profits and social enterprises in the countries where our clients make grants. Our knowledge of the local context enables us to source organizations with the ability to achieve the desired results. In a sense, we act as scouts for our clients, clearing a path for active and effective high-impact philanthropy.

What results do donors expect to achieve?
Expectations vary widely: some donors just want to make sure their grant is used effectively, while others set ambitious quantitative targets (for instance, a project to find jobs for 13,000 young Brazilians). One of our clients explains it better than I could: "WISE not only provides technical support for projects thanks to their in-depth expertise, but also monitors them, which is essential. They check that the grants are used as effectively as possible, and according to plan. We find that very reassuring."

Are you closer to the philanthropist or to the partner organization?
Understanding the needs of both is the core of our expertise. It should be a win-win relationship. We meet with leaders of the partner organization to understand their key challenges and determine how we can achieve the maximum impact.

Do most philanthropists make a long-term commitment?
Philanthropists who choose to work with us are often looking to make a long-term commitment. The typical project lasts around three years, since it usually takes that long for beneficiaries to develop their full potential and become self-sufficient.

Arun, Dara and Lena* sit down to lunch in Siem Reap after a busy morning at school. They have been lastingly reintegrated into school, along with 500 other disadvantaged children. Every year, the self-funded school canteen trains 75 young people.

*not their real names

Do your clients engage directly with beneficiaries?
Our staff all have extensive on-the-ground experience, so they relate to local social entrepreneurs as fellow professionals. This approach creates trust and facilitates an open and frank dialogue, enabling us to take corrective action if necessary. Most of our clients participate actively in the dialogue. They often join us on field trips to witness the impact of the projects they support. One donor, after watching young people from a São Paulo favela converse with his children, who were around the same age, turned to me in the taxi as we left and said, "We have a lot more in common than we have differences."

Bespoke approach

The hallmarks of WISE's approach are humility – ensuring they deeply understand the country, project, and environment, and don't rush to judgment – and rigor – keeping abreast of new developments in philanthropy, and spending neither too much nor too little time on a task.

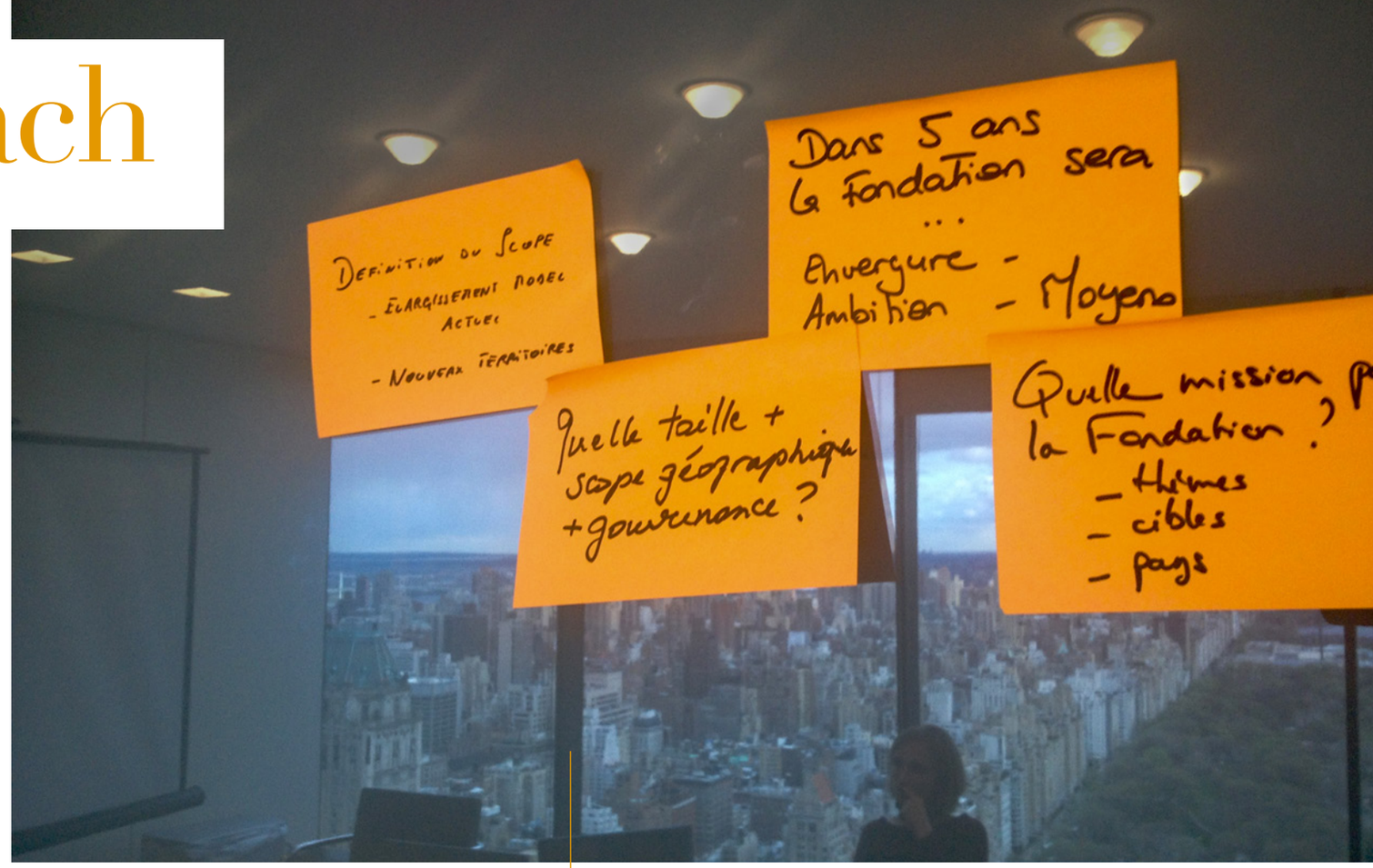
Director of a corporate foundation, Geneva

Philanthropy often involves a lot of asking and not enough listening. To understand your goals and help you shape your vision, we start by listening closely. Together, we identify the causes you care about most and discuss where you could make the difference. We offer a bespoke service, meaning we provide exactly the support you need.

Individuals, families, and companies have very different expectations and requirements for their philanthropy. We personalize our services, for example, by proposing several options in different countries and focus areas, in various-sized organizations, or according to criteria you set.

By listening closely to what you want, our team helps you identify meaningful projects in areas you care about, such as social development, education, health, or the environment. Whether you wish to support a project in Switzerland or abroad, we start by helping you formulate your vision to clearly define your mission and determine how best to achieve it. Finally, we put in place tools to efficiently monitor and manage your grants.

Our bespoke solutions are designed to fit you perfectly. Because what really matters is the difference you make.



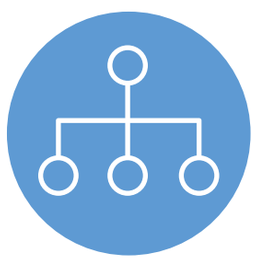
On her way home from an interactive workshop with members of the foundation's board, Nadia* reflects on her day. She realizes that, thanks to the strategy developed jointly by WISE and the board, the foundation's management will be better able to set clear priorities for the next five years.

*not her real name

Our services

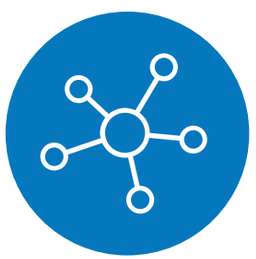
(re)Shaping your involvement

- Develop mission and guidelines for your philanthropy
- Offer guidance on structure, governance, and targeting of grants
- Structure your family's involvement



Managing your grants

- Source quality partners, organizations, and projects
- Define the strategic allocation of your grants
- Monitor and report on the impact of your grants



Facilitating meetings

- Design personalized field trips
- Coordinate family retreats and next-generation involvement
- Facilitate access to specialized training courses for donors

Increasing your impact

- Assess the quality, results, and global impact of your philanthropy
- Provide advice and expertise to achieve maximum impact
- Facilitate collaborations with peers and foundations

Warmly welcomed by local organizations, we learned to ask the right questions: going on a field trip with WISE was a real learning experience!

Claire Ruggieri-Levy
Fondation Juniclair, Luxembourg

WISE supports donors from the initial stages of their involvement, helping them to define what is most meaningful to them and incorporate good practices in their foundation. As part of this support, WISE organizes trips to the field for donors to meet partners and beneficiaries, and experience first-hand what has been achieved thanks to their support.

WISE's strength lies in helping clients structure their approach and set clear priorities.

Miren Bengoa
CHANEL Foundation, Paris

WISE organizes interactive workshops for private and corporate foundations to improve the planning of results and indicators.

WISE made me understand the importance of the people we work with: our colleagues, clients, partner organizations, and connections. They are what makes a career meaningful.

Jessie Johnsson, former intern and WISE team member, Geneva

Every year, WISE offers two six-month internships for recent graduates interested in pursuing a career in philanthropy.

A dedicated, united, and competent team. An innovative, proven methodology. A commitment to building long-term relationships, on both the personal and professional levels.

Xavier Isaac
Salamanca Group Trust and Fiduciary, London

WISE advises professionals who work closely with entrepreneurs or families over several generations, and offers bespoke solutions.

WISE has a pragmatic, entrepreneurial approach to philanthropy, which really resonates with me as an entrepreneur.

Yann Borgstedt
Womanity Foundation, Geneva

WISE helps foundations and private donors to put their impact into perspective through the use of sound processes and tools.

We co-financed a remarkable project in Brazil with WISE, and were impressed by their professionalism and diligence.

James Marshall
Private donor, Hong Kong

With the help of its network of consultants around the world, WISE selects portfolios of partner organizations for its clients. Then, grant allocations are planned and progress reports are provided over the entire lifespan of a project, which generally lasts between three and five years.

Contact us

We would be glad to meet you and discuss your projects. Contact us to make an appointment at our offices in Geneva or Ho Chi Minh City.

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Since its foundation, WISE has been recognized by its peers for the excellence of its services. Our awards include "Philanthropy Team of the Year," from the STEP community – the first non Anglo-Saxon company to earn the distinction – and the Innovation Prize of the Chamber of Commerce, Services and Industry of Geneva.

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