

Our Comprehensive Solution includes:

- Capacity to Manage High Volume
- 24 Hour Payment Turn-Around
- OFAC Review
- Custody & Investment Neutral

DISTRIBUTIONS

Need timely and accurate distribution completed? How about a specific tax code for each distribution? Our highly skilled team will ensure all approved distributions are paid within 24 hours via electronic payment or check. In addition, RenPSG will review each distribution against the OFAC database.

TAX RETURNS

Our staff completes all tax returns accurately and on-time for thousands of trusts each year. Trustees also are able to review and approve all tax returns online.

ONLINE ACCESS

With online access for beneficiaries, trustees and staff, RenPSG's proprietary software allows users to view information through a website branded specific to the organization.

Beneficiaries & Interested Parties can view:

- Account holdings & transaction history
- Statements
- Enter distribution requests and upload documentation
- Correspondence

Staff can view:

- All of the above
- Ability for Trustee to review, approve and deny distribution requests
- Monitor current status of all distributions
- Executive Dashboard (Summary of All Accounts)

UNITIZED ACCOUNTING

A foreign term to anyone not involved with pooled investments but one of RenPSG's greatest strengths. Our system can provide unitized accounting on a daily basis with no restrictions on the timing of the additions or withdrawals from the investment pool. In addition, accounting for individually managed accounts is available.

REPORTING CAPABILITIES

Robust reporting for staff includes:

- Access to a Reports Module that provides unlimited customized reports
- Month-End and Year-End package for staff & trustee

Beneficiaries and Interested Parties receive a branded statement that includes:

- Account holdings, beginning balance, market value change, ending balance, realized gains, contributions and distributions

ABOUT US

Renaissance Philanthropic Solutions Group (RenPSG) is the largest independent philanthropic solutions provider in North America. With nearly 30 years of industry knowledge, RenPSG delivers custom solutions that include tax expertise, accounting support and impeccable client service, all through our proprietary cloud computing technology. We currently service more than \$6.3 Billion of assets to include charitable trusts, donor-advised funds, pooled income funds, endowments, pooled special needs trusts and private foundations.