

Managed services overview

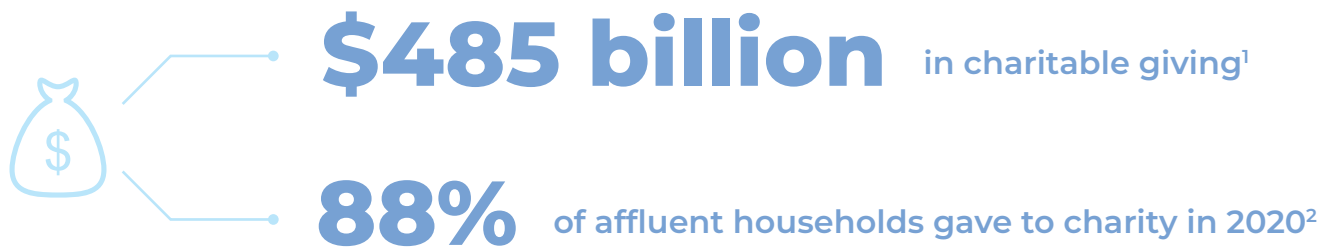
Predictive, proactive, and personalized support
that removes the friction from philanthropy



Philanthropy is thriving

According to Giving USA's Annual Report on Philanthropy, Americans' charitable giving continued to flourish in 2021, with donors entrusting approximately \$485 billion to U.S. charities.¹

Giving remains high in affluent households as well. According to a recent Bank of America study of philanthropy, 88% of those households gave to charity in 2020.²



¹ <https://givingusa.org/giving-usa-2020-charitable-giving-showed-solid-growth-climbing-to-449-64-billion-in-2019-one-of-the-highest-years-for-giving-on-record/>

² <https://www.privatebank.bankofamerica.com/articles/2021-bank-of-america-study-how-affluent-households-gave-back-in-2020.html>



Client service and operational teams can't keep up





Across the current landscape, many companies self-manage client services and back-office operations are overwhelmed.



Inability to scale

Seasonality is key for the wealth management industry. Activity triples or quadruples during giving season and most teams lack flexibility and struggle to scale in order to meet shifting demands.



Advisor confusion

Advisors don't always know where to go for issues, why some requests aren't addressed in a timely matter, nor do they have transparency into the status of those requests.



Service obstacles

While service associates work hard to meet client needs, they often lack the necessary tools, knowledge, or integration to manage and resolve inquiries effectively and efficiently.





Smooth the path to giving with reinvented managed services

We're intensely familiar with our clients' challenges and we have built deep industry expertise to support their success.

It's time to rethink managed services. In the past, philanthropy lacked innovation. Ren recognized this opportunity to reinvent the delivery of managed services and simplify giving for clients.

Get back to the basics

Focus on the essentials – improve metrics, enhance coaching and training, and build a true performance culture to upgrade the customer experience and increase customer engagement.

Empower associates

Drive cultural, process, and technology changes to develop and equip associates with the tools to provide state-of-the-art client service.

Realign strategic pursuits

Adjust resources and skillsets to drive, prioritize, and influence our most important efforts, such as automation, Salesforce evolution, workforce management, organizational effectiveness, and partnerships.

Join the culture shift to become more customer-centric and data-driven.

Upgrade your managed services experience

The vision to transform how managed services are delivered focuses on six key themes. These themes address foundational, impactful service opportunities that help advisors achieve better outcomes for clients.



Brilliant at the basics

Ensure the fundamentals are in place to best serve our clients.



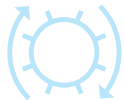
Excellence hubs

Create centralized hubs of service excellence focused on the delivery of quality services.



Lightning informatics

Get the right data in the right service hands, at the right time, in the most effective way.



Automation

Machine learning and robotic process automation (RPA) eliminate transactional work and enable a focus on value-add service interactions.



Client empowerment

Service is not just a person on the other end of the phone. We make sure clients are equipped with the tools and support to help themselves.



Service beyond boundaries

Break down the traditional way of thinking for our client services organization.



Industry-leading services that translate to value

A focus on the business of people and service makes Ren distinct in the philanthropic space. Ren has built an uncommonly good managed service organization that empowers associates to make a true difference for clients and evolve service to next-level excellence. You won't find this caliber of service anywhere else but Ren.

Improved performance

With a fine-tuned team that leverages operational metrics our ability to proactively resolve client inquiries has improved by leaps and bounds.

A foundation to scale

Seasonality is key for our business with activity often tripling or quadrupling during giving season. We've created the inherent flexibility to seamlessly support these demands each year. This foundation of flexibility allows for sustainable growth in operations as well as the ability to support seasonal needs in new ways.

Engaged employees

With a new approach to address the key drivers of engagement, we've built a team that is committed and motivated to help your team succeed.

Seeding new program teams

Our tenured team members are leveraged to seed new programs at launch. This ensures that you get the best start possible with experienced associates that can provide coaching and mentoring for your advisors.



|| Predictive, proactive, and personalized

Our predictive, proactive, and personalized support helps you and your team to go the extra mile.

- We **empower your team** with intuitive and personalized digital self-service tools. These integrated client tools allow your team to resolve issues on their own or through their channel of preference.
- We deliver **personalized high-touch service** as needed to educate, advise, and help your team build their muscles. When your teams need us, they are intelligently routed to the appropriate associate and centralized tools provide the associate with context to personalize the interaction.
- Our **relationship-oriented associates** strive to know your needs before you do and help you see around corners. Our goal is to be attuned to you. To know what you need and deliver it to you when needed.
- Our **scalable and flexible service team** is here to match your expansion. We are here to help you through any and all growing pains, helping you build a foundation for sustainable growth.



Get the best-in-class advantages with a progressive technology stack

Investing in market-leading solutions enables exceptional service at scale

Access the answers you need

The **Five9** cloud contact center platform has increased our agent and supervisor productivity and transformed how we engage with customers. With natural language interaction, or conversational AI, users move away from push-button options and just say what they need. The platform's intelligent phone routing gets callers to the right place for support. Users who have a simple question or need a quick status update benefit from intuitive, personalized self-service tools like automated self-help.

Preemptive support resolves issues before they arise

We've scaled and improved our service delivery with the **Salesforce** customer relationship management (CRM) solution. With a centralized client journey, our team has a holistic 360 view of client data that allows us to see trends and track and handle issues to address client needs even before they arise.

Get what's needed from every interaction

The **Verint** platform has supported our team in closing resource gaps and eliminating inefficiencies, connecting work, data, and experiences across the enterprise to deliver experiences that fulfill customer expectations.

Experience a team that delights customers

Paycor has helped us develop our people and build an exceptional customer service team. Focusing on talent development supported us in building a great workplace where agents know their purpose is to help our customers have great experiences in all their interactions with Ren.

Benefit from a spotlight on customers

Qualtrics has enabled a strong customer focus. We can deeply understand how we're performing for and supporting our customers and then use this information to improve our customer service and solutions.



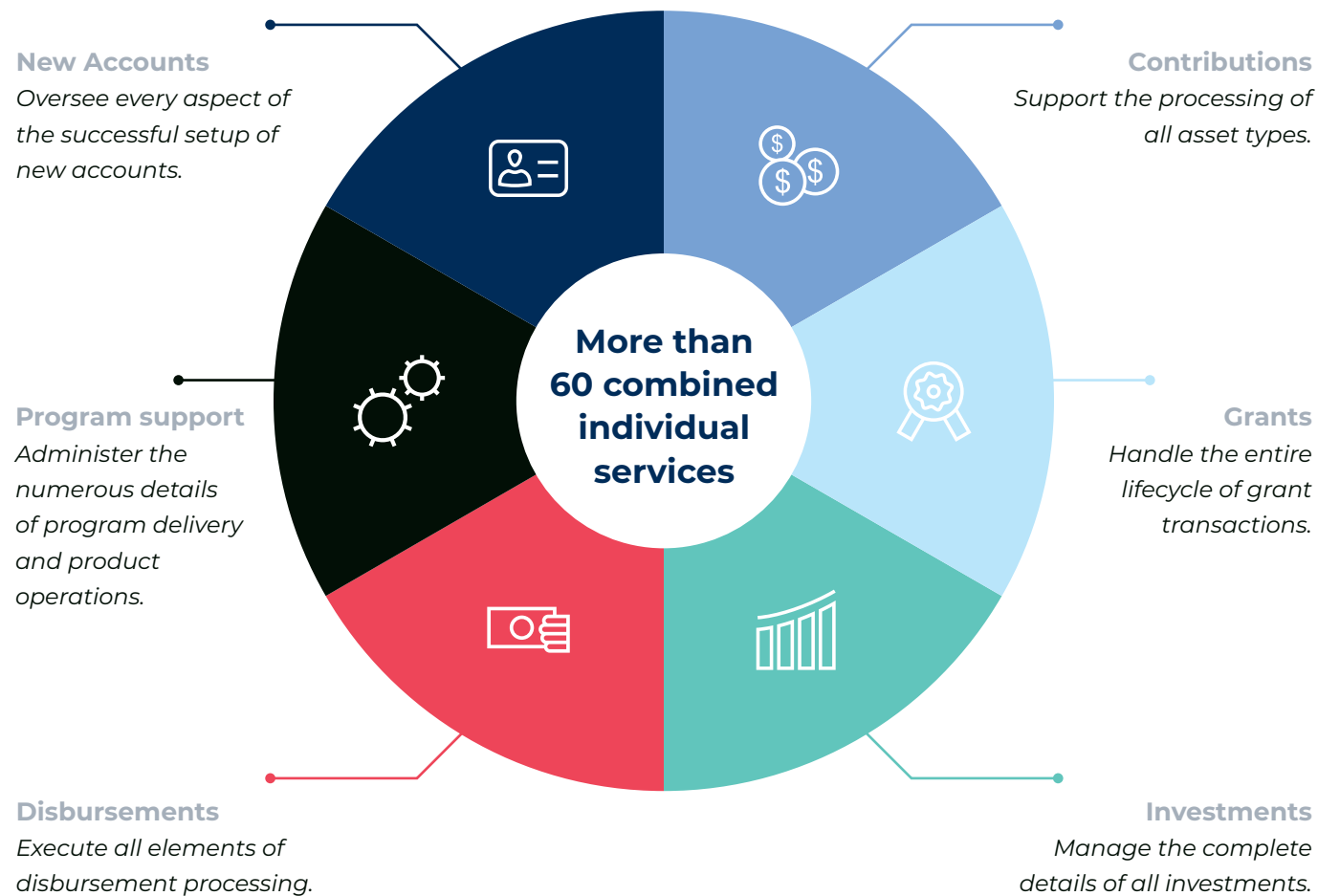
Deliver a smooth giving experience with Ren

Many vendors will tell you they'll help take you to the next level. Our industry-leading service will take you to the next level — the next level of comfort, where you know that we have your back. Ren takes care of the long list of minutiae needed to run a successful giving program. We work to remove the friction from all the steps of philanthropy and manage the daily details, so you and your clients have a smooth giving experience.

Whether you're in the market for a business-to-business (B2B) or business-to-consumer (B2C) support model, the foundation exists for you. Ren has the full gamut of services available to help you deliver a successful program.



Scalable and personalized managed services





New Accounts

- Platform access
- Online applications
- Paper applications
- Custom applications
- Application validation
- OFAC notification/reporting
- Donor Welcome communication
- Financial advisor welcome communication
- Legal review

Investments

- Daily/monthly/quarterly reconciliation
- Data feeds received
- Paper statements received
- Investment account website access
- General ledger integration files
- Monthly activity reports
- Daily unitization
- Daily NAV

Contributions

- Receiving account setup
- Receiving account monitoring
- Publicly traded securities
- Complex assets
- Cash
- Credit cards
- Liquidation of assets
- Investment of liquidated assets
- Contribution letters
- Tax receipts
- Legal review

Disbursements

- Distributions calculated
- ACHs/Wires processed
- Payment advice issued
- Branded letter insertion
- Stale check processing
- Void processing
- Daily/weekly check run
- Positive pay file
- Bank account reconciliation

Grants

- Branded checks issued
- Branded letter insertion
- Charity vetting
- Grant due diligence
- Grant board approval
- Individual invoices for funding
- OFAC notification/reporting
- Payments
- Ren for Charities integration

Program support

- Designated support team
- Dedicated #800 number
- Dedicated email address
- Training and education support
- Broad packages/reports
- Federal and state forms prepared/filed
- K-1s prepared
- Audit support
- Admin fees calculated
- Commissions calculated
- Commission file produced
- Other fees calculated
- Admin fee applied
- Individual invoices for redemption
- Central report for redemption

What customers are saying about Ren





Our new approach is working for our customers. The results speak for themselves with clients providing consistent feedback at 4+ stars across the board.

Ren has been the trusted partner for charitable gift solutions for more than three decades and we have staff with the skills and experience to manage it all. We support your programs at the highest level so your team can focus on growing your business.



4.39

Customer satisfaction

(Out of 194 responses)



4.26

Customer effort

(Out of 185 responses)



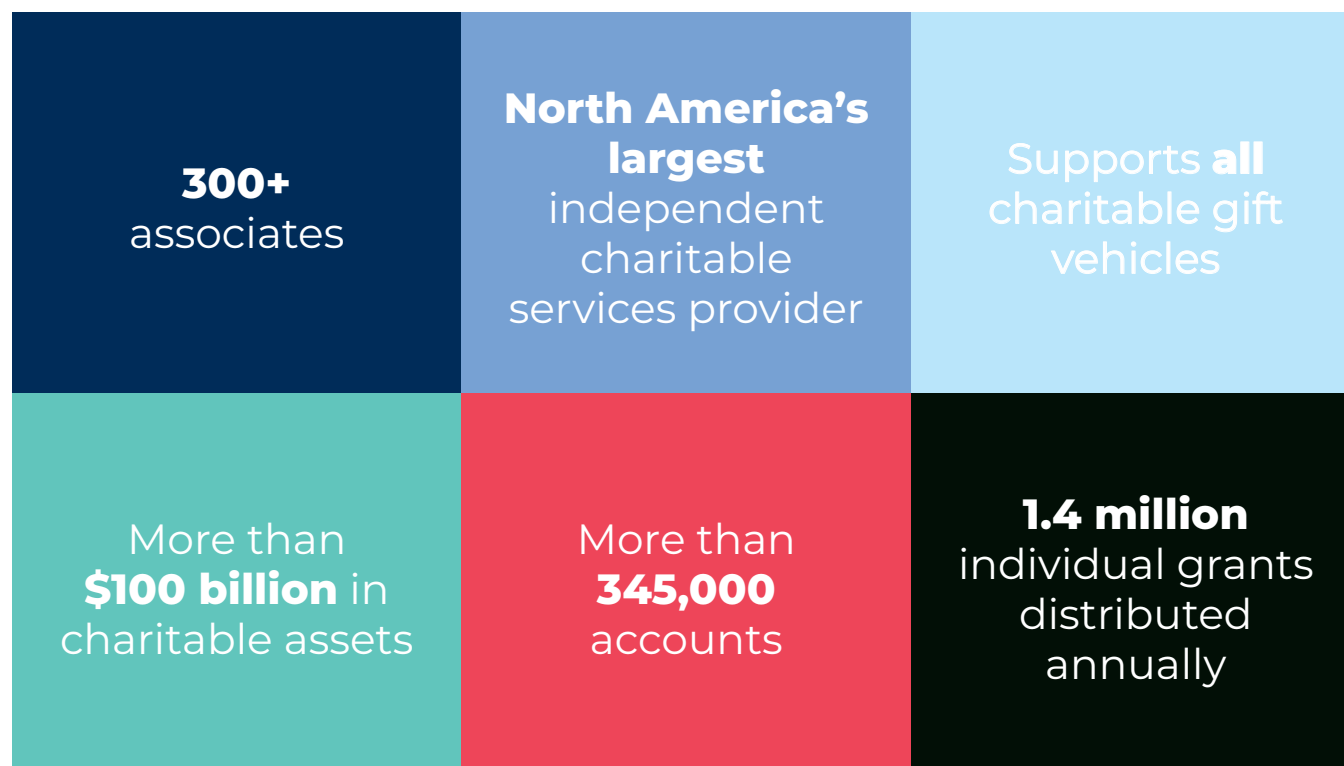
4.63

Associate service

(Out of 194 responses)

Ren's industry impact

With more than 35 years of experience in charitable gift services, we currently support charitable gift portfolios for more than 140 institutions – including large and small nonprofit organizations, universities, community foundations, and financial firms – and provide the expertise, standards, and technology these organizations need to attract new clients while keeping current ones happy and engaged.





Our skilled and specialized staff are here to support your growth

Regarded industry-wide as subject matter experts in the field of charitable giving, our associates include lawyers, accountants, MBAs, and CFPs as well as client service, IT, and operational experts. Our team has more than 850 years of combined planned giving and philanthropic knowledge, with an average leadership tenure of 16 years.

Today Ren is the largest independent charitable services provider in North America. And our managed services team has evolved over time with our business.



Remove the friction from philanthropy

Turn to Ren for a full-service, end-to-end charitable giving partner that removes the friction from philanthropy.

You have unique programs, products, and needs.

We aim to meet those needs at any level. Whether your company wants back-office assistance in navigating Ren's technology solutions, or you need support for interactions with donors or financial advisors.

You strive for continuous improvement.

Our associates continue to evolve into relationship-oriented advocates that don't just service inquiries and transactions but also educate and advise your people.

You want help to see around corners.

We strive to know your company's needs before you do, pursuing predictive, proactive, and personalized interactions.

At the end of the day, it's all about speed and efficiency while, at the same time, improving the experience for everyone involved. Ren is here to meet your needs with digital and high-touch services that are scalable and personalized.





Contact us today about managed services
at consulting@reninc.com



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