How a $130 million multi-vehicle strategy kept one shareholder's assets in-house, and added three new client relationships

One C-corp sale became a $130 million philanthropic plan because the advisor had a platform that could process complex assets before the transaction closed.

The challenge

A client preparing for a C-corporation acquisition wanted charitable options before the November closing. Competing firms couldn't process complex assets without third-party handlers, adding cost and slowing the timeline. The advisor needed a partner that could deliver a completed proposal, not a referral.

Solution

Ren's complex-asset team produced a detailed proposal within days, modeling charitable options, tax benefits, and timing for the acquisition. The first client funded a $20 million DAF through Renaissance Charitable with C-corp interests. After reviewing the plan, a second shareholder opened a $10 million DAF through Renaissance Charitable. Both clients then structured charitable remainder trusts (CRUTs) totaling $100 million in C-corp interests, administered by Ren. A third and fourth shareholder joined with their own Renaissance Charitable DAFs.

Ren reviewed attorney-drafted trust documents, corrected language that improved donor income outcomes, and maintained near-daily advisor communication for six weeks.
When the clients considered a private foundation, Renaissance Charitable DAFs made the case directly: custom investment portfolios, equivalent control, no administrative overhead, no separate legal entity to maintain.

The outcome

$130 million in DAFs and CRUTs, structured across four shareholders in two months. The advisor retained the investment management role, avoided displacement by corporate trustees, and picked up three new client relationships through referral.

Advisor insight

"Every time something felt too complicated, Ren had a clear, confident answer ready to go."

Takeaway

Advisors who can process complex assets in-house and administer DAFs and trusts under one roof don't just win the transaction. They become the person the family calls before the next one.

Want to help your clients do the same with collections, real estate, or other non-cash assets?

Reach out to AskanExpert@reninc.com and we'll help you navigate the options.