SERVING
Nonprofits
It’s a privilege to serve you®
Extraordinary causes deserve extraordinary service.
Serving Nonprofits

When it comes to reaching your organization’s fullest potential, you need partners who understand both you and your industry, inside and out.

At First Republic, we pride ourselves on being a banking partner who understands both the importance of mission and the value of exceptional service. Our mission-driven practice serves a robust community of over 4,000 nonprofits, including social service organizations, independent schools, the performing arts, museums, historical societies and community foundations.

The nonprofit organizations we serve benefit from financial solutions, unparalleled service and thought leadership forged from more than two decades of mission-driven partnership. In the pages ahead, you’ll learn about our holistic approach to serving the unique needs of your organization, employees and mission.
About First Republic

First Republic Bank is a full-service financial institution specializing in private banking, private business banking and real estate lending. First Republic Private Wealth Management, our wealth management affiliate, offers enhanced cash management, foreign exchange, trust, endowment and investment management advisory services. Together, we are committed to providing nonprofit clients extraordinary service, responsiveness and action.
Beyond Banking

Financial Executives Alliance
Complimentary networking group that brings together senior nonprofit financial professionals to discuss industry-related challenges.

Nonprofit Insights
Quarterly newsletter featuring articles and e-books that benefit you, your team and your mission.

Fundraisers Alliance
Educational group for nonprofit professionals to deepen fundraising skills, share best practices, and learn from peers and best-in-class service providers (currently offered in Boston, Los Angeles, New York and San Francisco).

In-Kind Donations
Donated office space and catering at our corporate locations, complete with videoconference capabilities for multicity meeting.

Financial Education
Financial literacy training for employees offered as digital modules covering financial basics, financing education costs, homebuying and saving for the future.

Volunteerism
First Republic offers employees 16 paid hours each year to volunteer at charitable organizations that make an impact on our communities.

Leadership Convening
Nonprofit events and workshops on topics that matter most to nonprofit leaders, board members and donors.

Cybersecurity Training
Internet Security Health Checks for up to 10 of your computers used to manage First Republic accounts, and sessions to educate your employees on common risks and identity threats.
Our clients say it best.
“First Republic truly understands the mission of nonprofits. Their support of our growth has meant a great deal to us.”

Kathy Hull, Psy.D.  
Founder and Board President

Bill Gisvold  
Board Member

When George Mark Children’s House opened its doors in 2004, it was the first pediatric palliative care center in the United States. In 2011, founder Dr. Kathy Hull approached First Republic for help in ensuring the sustainability of their mission and the House itself. With financial guidance from their personal banker, this goal has been achieved. And the staff at George Mark Children’s House continues to offer a home away from home for chronically sick and terminally ill children and their families, providing a calm and comfortable haven filled with joy and laughter.
“First Republic seamlessly integrates all of our nonprofit banking needs — and they make it look effortless.”

Jennifer Scarlett, D.V.M.
President
Pictured with Brooke

For over 150 years, the SF SPCA has been caring for animals and nurturing the city's deep human-animal bond. So when Dr. Jennifer Scarlett took over as president, she knew that her responsibilities would go beyond helping animals in need to ensuring that this unique bond would remain strong. The way she sees it, animals bring out the best in their human companions. In First Republic, Jennifer knows she has a banking and brokerage partner that's as responsive to her organization's needs as the SF SPCA is to the needs of the animals it cares for. This shared commitment to the nonprofit's long-term well-being has forged a client-bank bond of its own.
Modeled after a Venetian palace, the Isabella Stewart Gardner Museum has been home to masters such as Rembrandt, Raphael, Titian, Michelangelo, Whistler and Sargent for well over 100 years. The Museum’s new wing provides a platform for contemporary artists, musicians, dancers and scholars to showcase their creativity. In order to ensure the Museum remains a cultural home to the Boston community, its leadership team relies on First Republic and its nonprofit expertise, service and stability. Building on this foundation, the Museum can continue to preserve, protect and celebrate Isabella Stewart Gardner’s creation and safeguard her legacy for future generations.
“No matter where I am in the world, I know that my First Republic personal banker is just a phone call away.”

Soledad O’Brien

Co-Founder and Chairman, PowHERful Foundation; Journalist/Producer

Pictured with Scholars (standing left to right):
Vanesa Cruz, Ariana Quiñones, Tassion Minor, Rochelle Ballantyne

Soledad O’Brien began PowHERful Foundation with the intention of providing women of color financial assistance, mentoring and support to get to—and through—college. Her goal? To graduate confident, resourceful individuals who care about the world. To do this, Soledad knew she had to surround herself with others who shared her values. In First Republic, Soledad found a partner that cares for its clients as deeply as she cares about the women supported by her foundation. Since 2011, the organization has looked to the Bank to provide the resources and strategic guidance it needs to continue to transform lives—one scholar at a time.
“First Republic is more than just a bank — they’re a partner in our mission.”

Megan Murphy  
*Executive Director*

Since 1991, the National Coalition of Girls’ Schools (NCGS) has remained focused on one mission: empowering today’s K-12 girls to be tomorrow’s leaders. This mission is achieved through a combination of advocacy, research, networking and professional development for educators of girls. NCGS’s commitment to preparing the next generation of women for success finds a perfect pairing with First Republic’s commitment to mission-driven nonprofits. NCGS considers First Republic a strategic partner and draws on the Bank’s deep well of experience with independent schools in their ongoing development efforts on behalf of girls’ schools worldwide.
Private Business Banking

In working with First Republic, you gain an objective, accessible financial partner who knows your business inside and out and who can help you make decisions that are in the best interests of your organization. To get there from here, we commit ourselves to going above and beyond to provide you with an unprecedented level of service that exceeds expectations.
Financing Services

We strive to provide every organization we serve a suite of integrated products and services to help them meet both their short- and long-term financial objectives. To this end, we offer:

• Lines of credit to support your mission-driven operating needs
• Capital campaign bridge loans to compensate for the lag in timing of pledges converting into cash
• Tax-exempt, long-term loans with multiple structures featuring variable- and fixed-rate solutions
• Construction loans for acquisition, expansion and capital improvements

Treasury Services

At First Republic, we offer a range of services to help support and streamline your business banking needs, including:

• Account analysis system to help minimize eligible fees and maximize interest income through our highly competitive earnings credit rate
• Online reporting along with the ability to customize reports
• Check and ACH Positive Pay services via Corporate Online to monitor and detect fraud
• Corporate Online to enable secure, around-the-clock online access to your business accounts
• Commercial card services to maximize working capital and improve efficiencies
• An on-demand courier service for when you need deposits picked up from your office
• Remote check deposit that allows you to scan and deposit checks conveniently, right from your desk
• Foreign and domestic wires that enable you to transfer funds electronically between financial institutions quickly and reliably¹
• Foreign currency exchange and hedging that provide the flexibility you need to adjust currency exposure¹
• On-site ATM installation and maintenance at no cost to your organization
• Biller and Payment Solutions that make it more convenient for your customers to make payments — allowing you to safely and securely accept multiple payment methods through a custom branded website
• Image-based lockbox payment processing with customized reporting options

¹ Foreign currency deposit accounts are offered by First Republic Bank, Member FDIC. FDIC insurance does not cover the foreign currency account (or Foreign Exchange transactions such as spot or forward contracts) for losses due to devaluation of foreign currency.

All loans are subject to First Republic Bank’s underwriting standards. Terms and conditions may apply. Ask your banker for details.

Banking products and services are provided by First Republic Bank, Member FDIC and Equal Housing Lender
For Your Employees

At First Republic, we understand that your banking needs — and those of your employees and board members — extend beyond those of your organization. That’s why we offer a full suite of private banking services designed to address your complete financial picture and help you achieve your personal goals. What’s more, as a Private Banking client, you work with a personal banker who knows you by name and serves as a single point of contact for all of your banking needs.
Personal Banking Services for Your Employees

First Republic offers some of the industry’s most convenient — and competitive — products for your personal needs, including:

• Our signature ATM Rebate Checking¹ account, which does not charge access fees and rebates access fees charged by other institutions, worldwide

• Residential, construction and renovation loans as well as interest-only home equity lines of credit²

• Personal lending services to help manage debt and obtain access to capital for future expenses²

• Online and mobile banking that allows you to gain access to your accounts, transfer funds and pay bills quickly and securely at your convenience

• Digital financial education resources to help you reach your financial goals

¹ Domestic and foreign country ATM access fees are rebated at the end of the monthly cycle. Foreign currency conversion and other usage fees vary by country and network and are not included in the rebated ATM access fees. Terms and conditions apply. Ask your banker for details.

² This is not a loan approval or commitment to lend. Loans are subject to First Republic Bank’s underwriting standards and verification of documents provided.
First Republic Private Wealth Management serves the unique needs of nonprofit institutions, foundations, individuals and families. We have extensive experience working closely with executive teams and investment committees to design, advise on and monitor an endowment portfolio aligned to pursue your financial objectives — without compromising risk tolerance.
Endowment and Investment Management

Our dedicated endowment management team provides the following comprehensive products, services and benefits:

- A holistic approach to your organization’s financial needs, including objective guidance on your organization’s assets (endowment), liabilities (loans), risk management strategy and endowment strategy
- Investment flexibility and a customized investment portfolio
- Sound, insightful advice supported by our in-house research team
- Investment policy statements designed in collaboration with your team to help you meet your financial and governance objectives
- An investment platform with access to diverse asset classes, including alternative investments¹
- Portfolio offerings based on standards of environmental, social and governance practices
- A dedicated research platform and extensive due diligence on all approved third-party managers
- Full transparency regarding performance as well as customized reporting
- Active participation in executive and investment committee meetings in order to engage members and provide support
- As a co-fiduciary of your organization, institutional stability during periods of board and leadership transition

¹ Not appropriate for, or available to, all clients. Minimum liquid asset balance levels apply.

Investment Advisory Services are offered through First Republic Investment Management, an SEC-Registered Investment Advisor and a wholly owned subsidiary of First Republic Bank.

Investment and Advisory Products and Services are Not FDIC Insured, Not Bank Guaranteed and May Lose Value.
Brokerage Services
First Republic Securities Company can provide a broad range of brokerage, trading and custody services. Some of the advantages of entrusting your brokerage services with us include:

• Full-service Wealth Managers who work with you to craft a customized plan designed to help meet your organization’s investment needs

• Stock donation services with reporting, donation instructions and optional standing instructions to liquidate incoming donations

• Online Brokerage accounts that allow you to make and manage all investment decisions through our website

• Transaction-based pricing that enables your organization to manage investment costs based on trade volumes

• Online brokerage account reporting so that you can gather a variety of account data into a single report to view, print or export

• Objectivity in selecting the best vehicles for your needs

Trust Services
First Republic Trust Company can partner with you to meet your donor needs for trust and estate administration or serve as a trustee of your Charitable Trusts.

Insurance Services
First Republic offers a wide range of tools and solutions designed to protect and enhance your organization's mission and the people who make it a reality. These include:

• Succession planning, along with the use of key man life and disability insurance, to help protect against financial loss in a time of crisis

• Customized donor endowment programs using specialized life insurance contracts that allow for significant future contributions on behalf of a donor during their lifetime and upon their passing

• Cash accumulation life insurance to fund key employee retention plans

• Comprehensive planning tools designed to provide donors with thoughtful and creative estate planning options to maximize gifts of cash and property to your organization
Strengthening Our Communities

At First Republic, we take pride in fulfilling our responsibilities as a community institution. Every day, we strive to be a force for good in the neighborhoods where we work and live, ensuring that our actions reflect our first corporate value: Do the right thing.

We are passionate about improving the quality of life for our neighbors by supporting organizations that serve the underserved, empower financial literacy and ensure arts access for all.

In addition, First Republic aligns its business and values with an emphasis on investing in and lending to the communities in which we operate. We have:

- Established a Community Advisory Board to help guide our community outreach and investment initiatives
- Designed a residential lending program to help more people become homeowners, offering attractive terms for buying or refinancing a primary residence in underserved, designated areas
- Committed to low-income housing tax credit investments, helping to finance the development of affordable, low-income rental units
- Implemented the First Republic Volunteer Program, which provides every full-time colleague with two paid workdays for volunteerism
First Republic Values

Do the Right Thing

Provide Extraordinary Service

Respect the Team

Take Responsibility

Think Positively

Move Forward, Move Fast

Grow

Have Fun
It would be a privilege to serve you.