Erdle Consulting Group

Independent philanthropic advisory for families, foundations, and the advisors who serve them.

OUR PERSPECTIVE

Most families we meet are deeply generous. Many sense their giving could be doing more but aren't sure where to start. That isn't a failure of generosity. It's a gap in structure.

High-net-worth families bring real discipline to how they build, protect, and transfer wealth. Their giving rarely receives the same care, even as more than $617 billion moves through private giving in the United States each year.[1] Philanthropic strategy is its own discipline. We help clients practice it well, in step with their wealth, estate, and tax planning.

2006	Independent	30+ years	$25M
Founded	No fundraising. No asset management. Our only agenda is yours.	Across nonprofit, philanthropic, and advisory work	Family foundation led as Executive Director

WHO WE SERVE

Families and individuals	Navigating a liquidity event, retirement, or wealth transfer, and ready to give with more purpose.
Family foundations	Stewarding a shared mission through generational change, with governance built to last.
Wealth, estate, and tax advisors	Seeking an independent partner for the philanthropic side of a client's financial life. You keep the relationship. We handle the giving strategy.

WHY IT MATTERS NOW

$1.5T	1 in 3	6x
Annual economic contribution of U.S. nonprofits, over 5% of GDP.[2]	Nonprofits that faced a government funding disruption in early 2025.[3]	More given by self-described expert donors than by novices. Only 4% of affluent donors consider themselves experts.[4]

High-net-worth clients rank independent philanthropic advisors above their wealth, legal, and tax advisors for the most valuable giving guidance.[5]

> *"Generosity, practiced well, with intention, dignity, and awareness has the power to change lives."*
>
> ALLISON ERDLE, FOUNDER

OUR APPROACH

The Philanthropy Practice

Philanthropy isn't a one-time event. It's a practice. We bring the same discipline families apply to managing capital to the way they manage their giving, beginning with an honest assessment across four areas.

01 Philanthropic Identity
Your values, family giving history, risk tolerance, and the dynamics that shape a shared vision.

02 Operational Excellence
The time, knowledge, structures, and giving vehicles behind your philanthropy.

03 Strategic Grantmaking
Focus areas, issue knowledge, closer ties to community, and funding that gives nonprofits a genuine runway.

04 Impact & Vision
A vision grounded in your values, with the indicators and accountability to know your giving is working.

HOW WE WORK

1 Assess
A point-in-time review of values, family engagement, giving, and goals.

2 Plan
A written philanthropy plan. You choose the priorities.

3 Integrate
Aligned with your estate, wealth, giving vehicles, and tax timing.

4 Practice
We implement, measure, and adjust, for one year or across generations.

WAYS TO ENGAGE

Philanthropic Clarity Plan	A focused engagement to define what you want your giving to do, with a written assessment and a strategic giving roadmap.
Strategy + Implementation	A full plan put to work: family facilitation, governance and giving-vehicle guidance, nonprofit due diligence, and a multi-year grantmaking framework.
Partnership + Implementation	An ongoing seat at the table alongside your advisors, with annual strategy, next-generation engagement, and governance support.

Fees are tailored to scope and discussed during an initial, complimentary conversation.

FOUNDER



Allison Erdle has spent 30 years on every side of philanthropy: nonprofit professional, major gift fundraiser, international corporate giving, foundation executive director, and 4th-generation board member of her family's foundation. As Executive Director, she led the $25 million Washington Forrest Foundation, granting more than $1 million a year in Arlington, Virginia.

Davidson College | International MBA, University of South Carolina | Executive Certificate in Philanthropic Leadership, Georgetown University

TO START A CONVERSATION

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Notes

1. Giving USA Foundation, Giving USA 2026: The Annual Report on Philanthropy for the Year 2025. 2. Independent Sector, Health of the U.S. Nonprofit Sector (Dec. 2025). 3. Urban Institute, How Government Funding Disruptions Affected Nonprofits in Early 2025 (Oct. 2025). 4. Bank of America and Indiana University Lilly Family School of Philanthropy, 2025 Bank of America Study of Philanthropy. 5. The Philanthropic Initiative, 2026 TPI Study of the Philanthropic Conversation. Erdle Consulting Group does not provide legal, tax, or investment advice.