



# CASE STUDY

## Ms. Fink's Estate

How Strategic Philanthropy helped a donor secure a future for a highly-personal complex asset through the right institutional partnership.

### THE NEEDS

- Translate a personal vision into a viable plan
- Clarify legacy goals for real estate assets
- Identify the right long-term institutional partner

### OBJECTIVE #1

Document a clear legacy plan for a very personal estate asset

### OBJECTIVE #2

Identify the institutional partner best able to carry out Ms. Fink's vision

### OBJECTIVE #3

Create a practical path from personal property to public benefit

### AN UNSETTLED LEGACY

Ms. Fink had devoted extraordinary care and resources to restoring her family homestead in rural Louisiana, transforming it into a remarkable equine research property. She had no heirs, but she had a clear vision: after her lifetime, the property should continue serving horses through research and training. What she did not yet have was a documented plan—or the right partner—to make that vision real.

### PLANNING AROUND A VISION

Strategic Philanthropy was brought in at a critical moment. Ms. Fink wanted reassurance that her property, resources, and intentions would be carried forward exactly as she envisioned. Our work began with deep listening, careful planning, and translating a highly personal goal into a structure that could be understood and evaluated by institutional partners. This required both technical program strategy and significant trust-building.

### UNIVERSITY OUTREACH AND ASSESSMENT

We assessed a range of universities that might be equipped to steward the property as an equine research and training site. That meant institutions with the right academic focus, capacity, and willingness to take on a rural, customized opportunity. We led outreach, framed the opportunity, managed conversations, and connected Ms. Fink with the institution best positioned to move her vision forward.

### TURNING VISION INTO A REALITY

By the end of the engagement, Ms. Fink had what she had been seeking: a credible institutional partner and a clearer path for carrying her vision beyond her lifetime. Strategic Philanthropy helped transform a deeply personal property into a legacy opportunity with public purpose. The work brought structure, direction, and confidence to a situation where the stakes felt urgent and intensely personal.

### TESTIMONIAL

*"It was a lot of work to assess how my legacy plan would fit into each university's own goals and capabilities. I needed to make sure it would be a lasting relationship. In the end, I found one that was eager to help make my vision a reality."*



www.stratphilanthropy.com  
info@stratphilanthropy.com  
773-244-5185