



“Increasing bottom line profits while creating a recurring donation stream to our community partners seemed too good to be true, but Purpose in Expenses delivered on their promise”

-- KATHY FETKE Co-CEO at RealWealth



A purpose driven real estate company supports their charity partners every phone call they make

RealWealth was able to create new recurring donation streams to their charity partners while increasing profits and enhancing company culture



RealWealth is a purpose-driven real estate investment advisory group who has been donating 10% of profits every quarter to charity impact partners for nearly 20 years. The company culture is driven by a passion to serve not only their members but also several nonprofit partners they support through their regular donations.

### The challenge

RealWealth’s team is highly engaged in the company’s nonprofit impact partnerships with Habitat for Humanity, Mentors International, Operation Smile, and Youth Opportunity Center. RealWealth is growing fast, so their financial performance can fluctuate. When profitability goals were not met their executive team was forced to give the morale-busting news to both their team and nonprofit partners that the donation goals would not be satisfied. RealWealth wanted to deepen their impact commitment by creating a consistent, recurring stream of nonprofit support to optimize the team’s morale regardless of how the company was performing in any given quarter.

### The approach

RealWealth engaged Purpose In Expenses to help with both profitability and impact optimization. RealWealth’s team trusted Purpose In Expenses with access to their vendor list to look for ways transform business and technology expenses into recurring donations while also reducing costs. Purpose In Expenses presented a 3-year road map showing how a simple, non-disruptive re-procurement of essential key technology services on the Purpose In Expenses platform would help increase purpose, profitability, and support growth



## Culture

"We presented our 3-year road map to our team showing how we plan to make every phone call, email, webinar, and invoice benefit our charity partners. They were so excited and our company moral has increased. We are thrilled to be working with Purpose In Expenses."

**RICH FETTKE-**  
Co-CEO at RealWealth

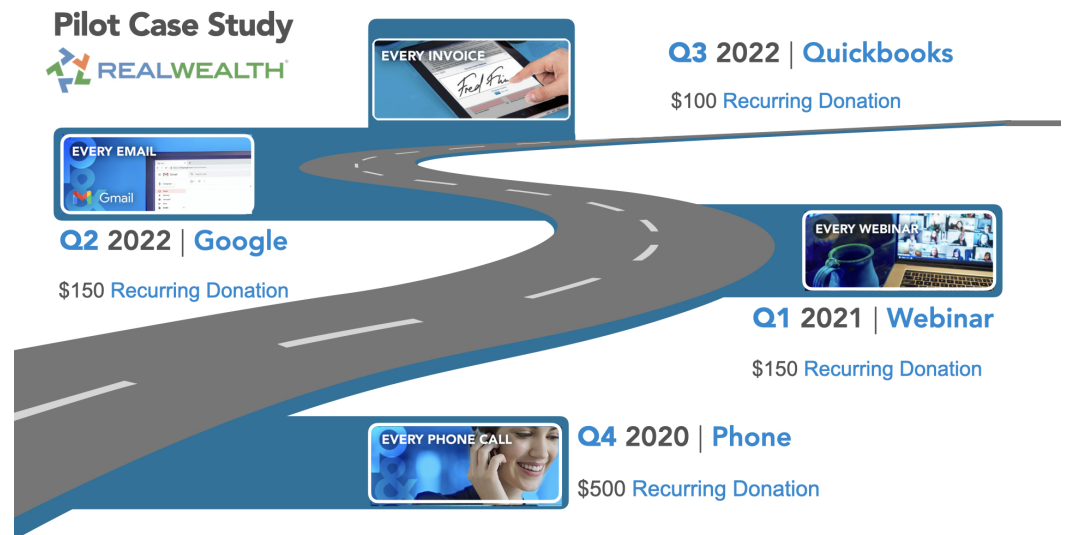
## ROI

"When our first project was proposed to maximize our impact, I feared the worst. But Purpose In Expenses made the process painless and even enjoyable, doing most of the heavy lifting. The ROI of this engagement is truly remarkable."

**KELLEY PECORARO**  
Director Finance & Administration

## The results

RealWealth's first purpose-powered phone service started in January 2021, resulting in 48% savings and a recurring \$500 donation to their charity partners. The team now knows that every call or business text message will be supporting their nonprofit partners, which has enhanced company morale noticeably. In Q4 of 2021 they did the same with their webinar service resulting in a 42% savings and recurring donation of \$150. In 2022 Google Workspace and Quickbooks to create a \$900 recurring donation by PIE that Real Wealth was able to celebrate & report.



As RealWealth grows and scales, and other vendor contracts become available for account ownership changes, the company will scale its impact by having Purpose In Expenses manage those vendor relationships on their behalf – at no cost to them. As Purpose In Expenses continues to build its portfolio of over 1,000 providers of recurring business services, RealWealth's consistent support to their nonprofit impact partners will continue grow as they procure essential services in other categories such as insurance, finance, HR, and more.



RealWealth shared their deeper commitment to purpose with assets like this to enhance employee engagement and culture



Schedule a 15 minute Strategy Session today!

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