

Investor Worksheet: Thought Starters for Charitable Giving

In the United States, charitable giving is at an all-time high and continues to be an important part of community engagement. While many individuals are giving more to charity, they may be giving in a suboptimal way.

Financial advisors can play an important role in guiding families in philanthropic efforts. Use this worksheet to identify your specific charitable goals and develop an effective giving strategy.

CHARITABLE THOUGHT STARTERS

Review the following questions to explore your philanthropic efforts and to help create a charitable giving plan with your financial advisor.



IDENTIFY YOUR GIVING LANDSCAPE

- How do you decide how much to give each year? What inspires fluctuations from year to year?
- Do you typically itemize your deductions for tax purposes or do you use the standard deduction?
- What do you currently donate (i.e. cash, property, investments) and how do you donate (e.g. direct, donor advised fund, etc.)?



CONSIDER YOUR GIVING GOALS

- How important is a charitable giving to you and your family? How are you encouraging and/or supporting philanthropy in the next generation?
- Are there any social causes that are particularly important to you or your family?
- What inspires you to give? How do you see this evolving in the coming years?



REVIEW YOUR EXISTING GIVING STRATEGY

- How do you decide which charities to support? Do you prefer big organizations or small?
- How active would you consider yourself to be in charities you donate to?
- How have your children been involved in your charitable giving efforts or decisions?
- How do you feel after making donations? Do you feel satisfied or are there any frustrations with the giving process?
- Do you donate throughout the year or do you wait to give at the end of the year?
- How do you determine the frequency of your gifts?
- Are you aware of the different charitable vehicles to use for charitable gifting?
- Have you set a charitable giving budget annually? Over the next 3 years? 5 years?

USE THIS WORKSHEET TO IDENTIFY ORGANIZATIONS YOU CONSIDER

- *Values Alignment:* bullet out how this charity aligns with your values
- *Background:* consider what inspires you to consider this organization
- *Specific Cause:* categorize organization, such as Religion, Education, Human Services, Foundations, Health, Arts/Culture, Environment/Animals
- *Charitable organization:* identify each organization you support or are interested in supporting

Values	Background	Specific cause	Charitable organization

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