



Giving

Guide

A Workbook
for Your
Charitable Giving

This Giving Guide

will lead you through exercises that help you:



Review

Your Past Giving

Giving happens in many forms. You can donate your time and talents through volunteering, or you can use your financial resources to support causes you care about. Look back at your past giving to determine if your giving aligns with your interests or if you want to change course.

What organizations do you support and how do you support them?

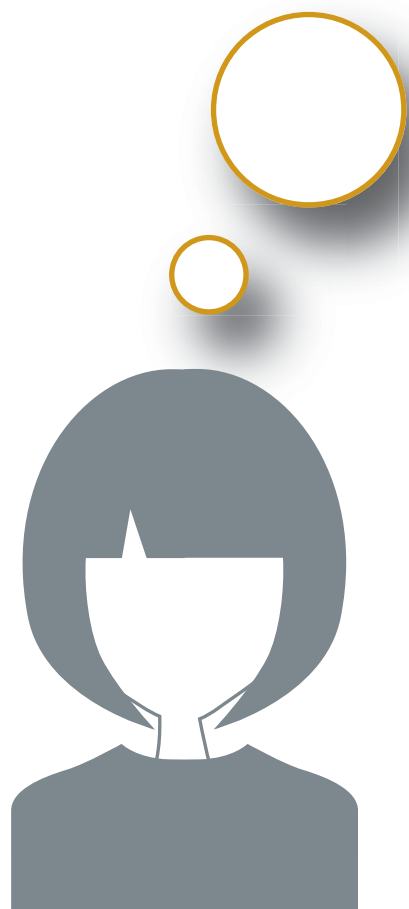
What was your most meaningful or rewarding charitable investment or volunteer experience?

What was your most disappointing charitable moment?

Consider Your Charitable Motivations

Take a moment to think about the following questions. Add any thoughts that might direct your charitable investments.

How would you improve the world?
What makes you happy?
What makes you sad?
Do you want to help today, focusing on immediate needs?
Do you want to address root causes and seek long-term solutions?
What do you believe is the best use of your charitable dollars?
What results do you want your charitable investments to achieve?





Record Your Values

What do you value most? Start by circling values that resonate with your core principles and crossing out those that have little influence on your life.

- | | | |
|------------------|--------------|-----------------|
| Acceptance | Equity | Movement |
| Access | Excellence | Opportunity |
| Acknowledgement | Expertise | Passion |
| Activity | Fairness | Patriotism |
| Beauty | Faith | Peace |
| Change | Family | Personal Growth |
| Collaboration | Freedom | Preservation |
| Commitment | Generosity | Pride |
| Communication | Happiness | Privacy |
| Community | Harmony | Respect |
| Compassion | Healing | Responsibility |
| Competition | Honesty | Security |
| Conservation | Humility | Self-Expression |
| Courage | Inclusion | Self-Reliance |
| Creativity | Independence | Service |
| Democracy | Innovation | Simplicity |
| Dignity | Integrity | Stability |
| Diplomacy | Involvement | Stewardship |
| Discipline | Joy | Sustainability |
| Diversity | Justice | Tolerance |
| Education | Knowledge | Transformation |
| Empathy | Leadership | Truth |
| Empowerment | Love | Versatility |
| Energy | Loyalty | Wisdom |
| Entrepreneurship | Merit | |

Of the values you circled, which three hold the greatest impact or meaning to you? Feel free to add values that were not listed on the previous page.



Identify Your Interest Areas

Arts & Culture
 Literary
 Performance
 Visual

Animal-Related
 Animal Protection & Welfare
 Wildlife Protection
 Zoos & Aquariums

Civil Rights & Advocacy

Community Improvement

Crime & Legal-Related

Diseases, Disorders & Medicine
 Medical Research

Disaster Preparedness & Relief

Education
 Preschool
 Elementary & Secondary
 Higher Education

Employment
 Job Training & Placement
 Vocational Counseling

Environment
 Botanical
 Natural Resources & Conservation
 Recycling
 Water

Food, Agriculture & Nutrition
 Agriculture Programs
 Food Banks & Pantries
 Meal Delivery

Health
 Health Care Delivery
 Mental Health & Crisis Intervention
 Substance Abuse

Housing & Shelter
 Home Improvement and Repairs
 Homeless Shelters
 Senior Housing
 Subsidized Housing

Human Services
 Aging
 Children, Youth & Family Services
 Domestic Violence

International Affairs & National Security

Philanthropy & Volunteerism

Recreation & Sports

Religion-Related

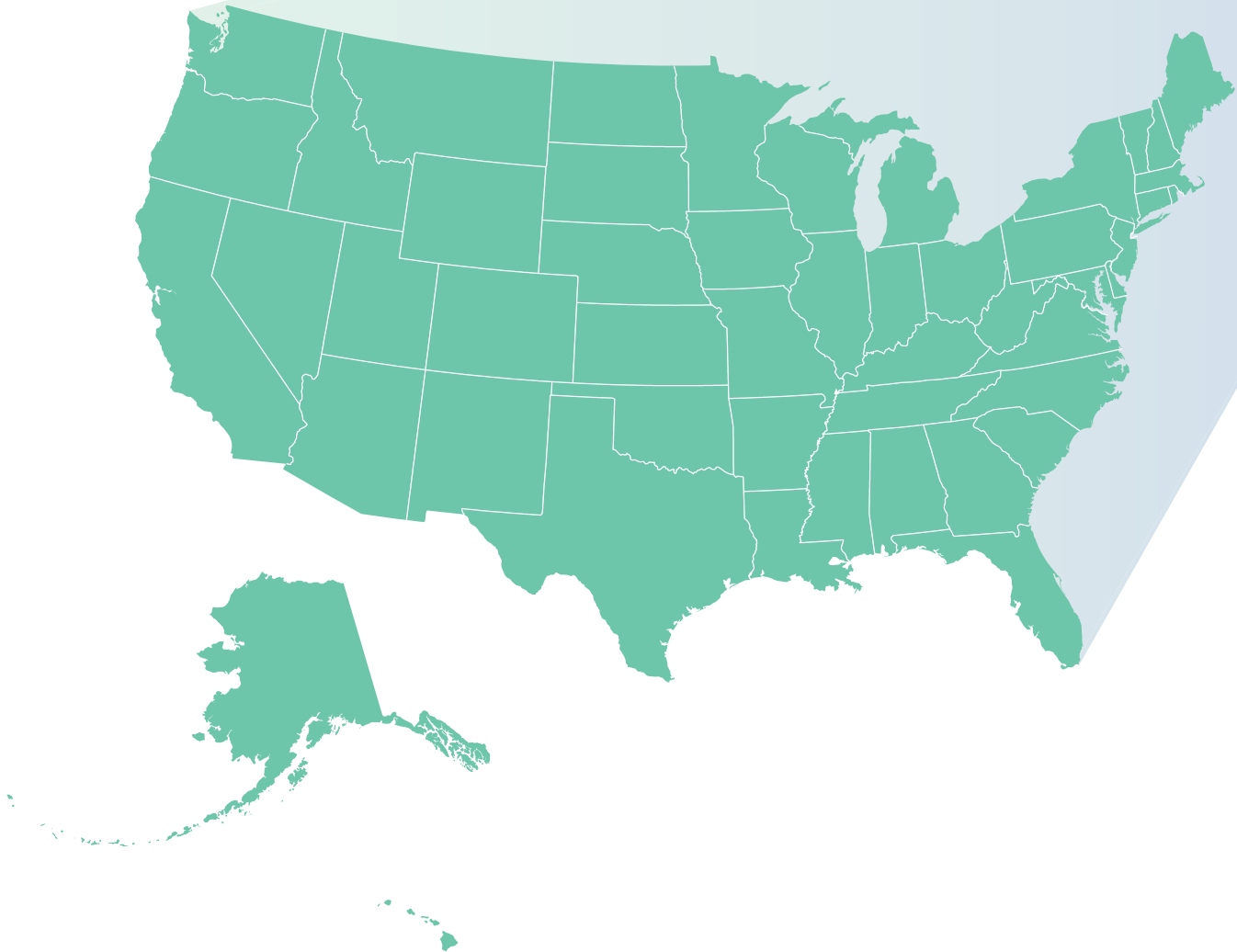
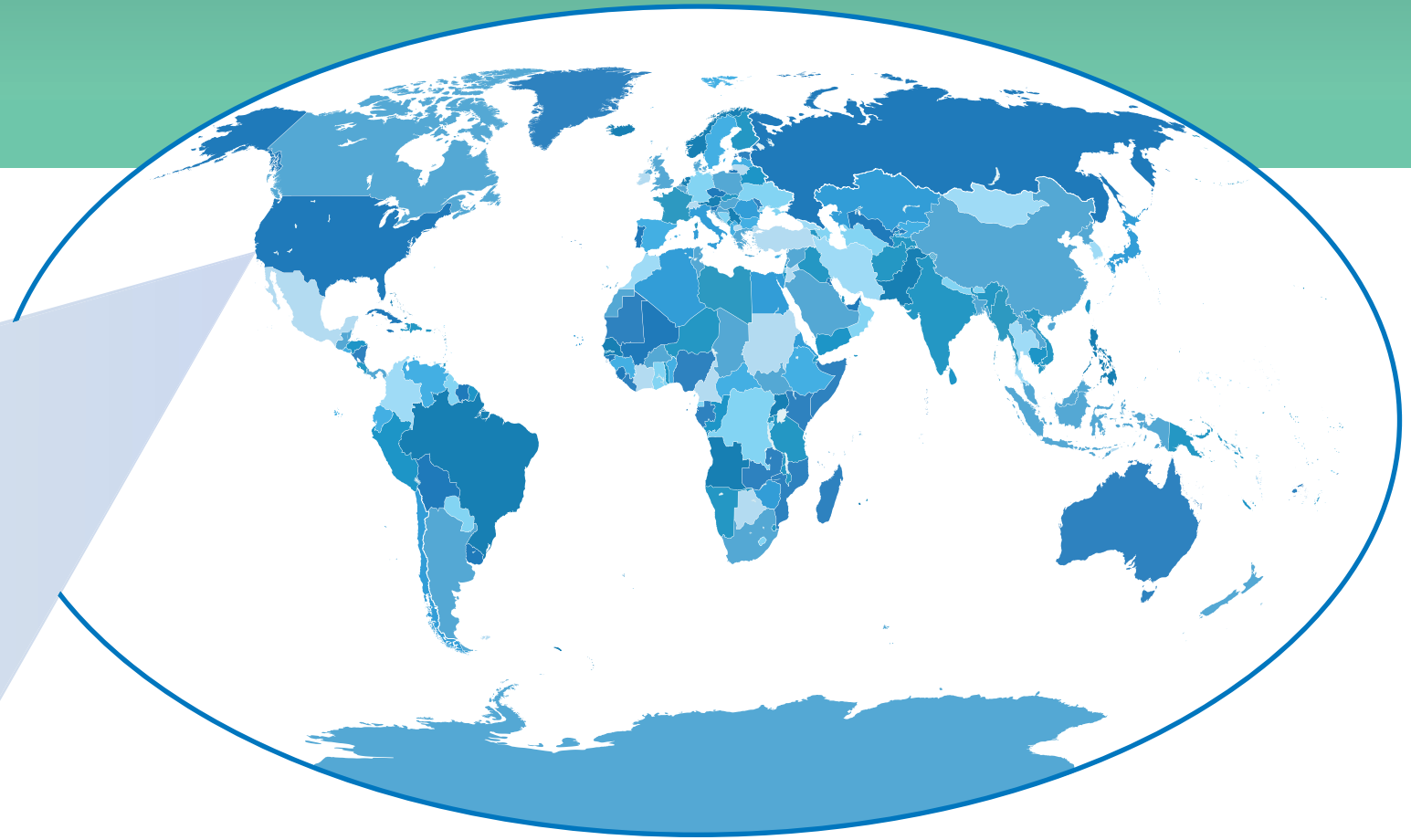
Science & Technology
 Astronomy
 Biological & Life Sciences
 Chemistry
 Computer Science
 Engineering & Technology
 Marine Science & Oceanography
 Physical & Earth Sciences

Youth Development
 Youth Centers
 Service Clubs





Define Your Community



Consider the community or communities you want to support. This could mean a geographic area or a population, for example, individuals with disabilities, religious groups or the LGBT community. Are there specific cultures or regions you care about? Circle or list specific countries, populations or community groups.



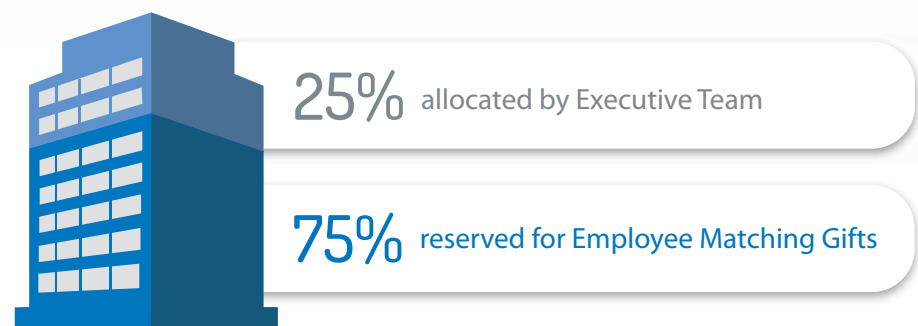
Set Your Giving Guidelines

You may consider dividing your giving, allocating percentages for each area.
Or, you may prefer to set guidelines for others who may participate in your giving.

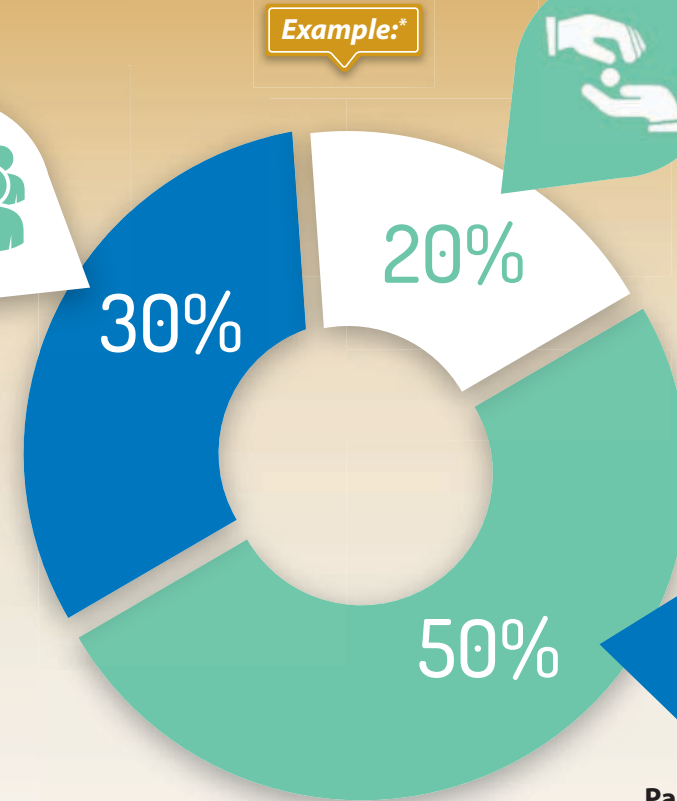
Family Example:



Corporate Example:



Community
Set aside money for ongoing charitable obligations to religious institutions, alma maters and other organizations you wish to regularly support.



Example:



Impulse
Reserve some funds so you can say yes to friends who ask for your support, or answer a particularly moving request.



Passions and Priorities
Focus your giving on one or two organizations for maximum impact.

Use this graph to illustrate your own giving guidelines.

*The "50/30/20" Rule for Fulfilled Giving: Jason Franklin, Ph.D.



Establish Your Specifics

You may want to identify specific causes or organizations you feel strongly about supporting.

Examples:

- ▶▶ We believe in the importance of public education, at both K through 12 and higher education levels. We support the School District Education Foundation and the State University.
- ▶▶ We are interested in visual and performing arts. We wish to support the Museum and the Orchestra.

Document Your Absolutes

You can choose to outline more stringent rules for your giving.

Examples:

- ▶▶ We will only support programs benefitting our metro area.
- ▶▶ Under no circumstances will we support organizations that _____.



Next Steps



Think of this Giving Guide as a living document. You can come back periodically and make updates as you evolve in your giving, and it can serve as a reminder or motivation as you make your charitable decisions.

If you want assistance carrying out your giving plans, we have philanthropic advisors who can help organize and maximize your charitable gifts through a charitable giving account, also known as a donor-advised fund. Charitable giving accounts allow you to maximize your giving, simplify your donations and give to the causes you love.

Contact us to learn more.

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