

Our family's philanthropic plan

When creating a philanthropic plan for your family, it is important to consider the interests of all family members—building a strong, united foundation for your family's philanthropy. This can include outlining the goals of your giving, the time frame for achieving these goals, and the specific causes, charities, or geographic area your family intends to support. You can also determine how you might measure the impact of your giving together.

Using the spaces below, craft your family's charitable mission statement and define the goals you would like to reach. Then, you and your family can develop a plan to keep you focused on achieving them.

Conversation starters

- ▶ What do each of us value?
- ▶ What are our family members passionate about?
- ▶ Why does each individual feel strongly about the causes they support?
- ▶ Are there common themes in our family's charitable values?

Digging deeper

- ▶ What milestones or achievements do we want to achieve in the short- and long-term?
- ▶ How should we split our giving between volunteering and financial support?
- ▶ How do we measure the success of the charities we support?
- ▶ How do we monitor the family's commitment to the mission over time?

The _____ Family philanthropic mission statement:

The _____ Family charitable goals:

Using the spaces below, define the specific short- and long-term goals your family would like to achieve. You can also determine the areas of interest, donation amount, and volunteering commitments your family plans to support.

Sample:

Charity/Area of interest	The arts
Goals	<ul style="list-style-type: none"> • Provide \$6,000 of annual support to our local theatre company's youth acting camp • Help coordinate our local high school's fundraising to buy new marching band equipment • Volunteer at the local arts festival to celebrate our community's rich artistic history
Timing	<input type="checkbox"/> Short-term <input checked="" type="checkbox"/> Long-term <input type="checkbox"/> Specific date:
Charity/Area of interest	
Goals	
Timing	
Charity/Area of interest	
Goals	
Timing	
Charity/Area of interest	
Goals	
Timing	

For more strategic giving resources,
 visit vanguardcharitable.org/resourcecenter