

# Create your charitable plan

Here are some questions that can help you craft your philanthropic plan.

## MISSION STATEMENT

### Considerations

**What is the purpose of your wealth? Philanthropy is an extension of your value and belief system.**

Why do you want to give to charity?

How do you want to be remembered?

What impact do you hope to achieve with your giving legacy?

### Responses

## GIVING GOALS

### Considerations

What social issues, charity, or area of charitable interest do you want to support? Is there a specific program or initiative you want to help fund?

What is your timeframe?

Do you want your heirs to continue your giving legacy? If so, how? How and when will you communicate to them?

How important are taxes vs philanthropic goals?

Philanthropy can be about your time, talents and treasure. What does that look like? How do you want to experience your philanthropy?

### Responses

## FINANCIAL RESOURCES, INVESTMENTS AND GIVING OPTIONS

### Considerations

What financial resources will you use? Cash, stock, art, real estate, complex assets, etc.?

What are the tax and legal implications associated with those various resources?

What investment options are appropriate?

What is your investment timeline for your granting and investment risk tolerance?

What giving option(s) best fits your preferences and goals?

What additional financial or other professionals need to be involved in creating and maintaining the giving option?

### Responses

## IMPLEMENTATION

### Considerations

What are the specific steps required to set up the plan, including the giving tool(s)?

### Responses

## ONGOING PLAN REVIEW AND MEASUREMENT

### Considerations

How will you monitor commitment to your mission over time?

How will you measure success?

Set a time for annual review of the plan.

### Responses