



*Increase Your Giving Power
for Lasting Impact*

Planning Your Philanthropy: Increase Your Impact and Satisfaction

Here are some questions for you and your family to discuss as you begin to make plans for your philanthropy. The questions are meant to give you an idea of what brings you satisfaction today, what values you possess, what issues you care about and how you see these coming together in your philanthropy.

1. What gifts did you make last year that were most meaningful to you?

Donation	Amount Given

What about the gifts made them most meaningful?

2. Where have you spent your volunteer time? List the times that were most meaningful to you.

Organization	Time Given	What You Do/Did

Why was the selected volunteer time most meaningful?

Are there other skills you have that you would like to share?

3. What follows is a list of values. Check the five that mean the most to you.

- | | | | |
|--|-------------------------------------|--|---|
| <input type="checkbox"/> Acceptance | <input type="checkbox"/> Dignity | <input type="checkbox"/> Honesty | <input type="checkbox"/> Peace |
| <input type="checkbox"/> Beauty | <input type="checkbox"/> Diversity | <input type="checkbox"/> Interdependence | <input type="checkbox"/> Preservation |
| <input type="checkbox"/> Commitment | <input type="checkbox"/> Equality | <input type="checkbox"/> Integrity | <input type="checkbox"/> Respect |
| <input type="checkbox"/> Communication | <input type="checkbox"/> Faith | <input type="checkbox"/> Justice | <input type="checkbox"/> Responsibility |
| <input type="checkbox"/> Community | <input type="checkbox"/> Family | <input type="checkbox"/> Joy | <input type="checkbox"/> Self-Sufficiency |
| <input type="checkbox"/> Compassion | <input type="checkbox"/> Freedom | <input type="checkbox"/> Knowledge | <input type="checkbox"/> Service |
| <input type="checkbox"/> Courage | <input type="checkbox"/> Generosity | <input type="checkbox"/> Love | <input type="checkbox"/> Simplicity |
| <input type="checkbox"/> Creativity | <input type="checkbox"/> Harmony | <input type="checkbox"/> Modesty | <input type="checkbox"/> Transformation |
| <input type="checkbox"/> Democracy | <input type="checkbox"/> Healing | <input type="checkbox"/> Opportunity | <input type="checkbox"/> Other: _____ |

Why did you select these values?

Why are these values important to you (i.e., formative experiences in your life, strong influences from other people in your life)?

4. What follows is a list of issues that you may care about as a giver. Check the five that are most important to you.

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> AIDS | <input type="checkbox"/> Economic Justice | <input type="checkbox"/> Immigrant and Refugee Rights and Services | <input type="checkbox"/> Poverty |
| <input type="checkbox"/> Animals | <input type="checkbox"/> Education | <input type="checkbox"/> International Development | <input type="checkbox"/> Prison Reform |
| <input type="checkbox"/> Anti-Semitism | <input type="checkbox"/> Employment Training and Job Creation | <input type="checkbox"/> Legal Aid | <input type="checkbox"/> Public Policy/Advocacy |
| <input type="checkbox"/> Arts and Arts Institutions | <input type="checkbox"/> Environment | <input type="checkbox"/> Libraries | <input type="checkbox"/> Religion and Religious Causes |
| <input type="checkbox"/> Boys | <input type="checkbox"/> Electoral Reform | <input type="checkbox"/> Literacy | <input type="checkbox"/> Reproductive Rights |
| <input type="checkbox"/> Children | <input type="checkbox"/> Faith-Based Community Service | <input type="checkbox"/> Media | <input type="checkbox"/> Seniors |
| <input type="checkbox"/> Civil Rights | <input type="checkbox"/> Gay/Lesbian Civil Rights | <input type="checkbox"/> Music | <input type="checkbox"/> Spiritual Development |
| <input type="checkbox"/> Community | <input type="checkbox"/> Girls | <input type="checkbox"/> Native American Rights | <input type="checkbox"/> Sports |
| <input type="checkbox"/> Corporate Responsibility | <input type="checkbox"/> Gun Control | <input type="checkbox"/> Parks and Land Preservation | <input type="checkbox"/> Sustainable Agriculture |
| <input type="checkbox"/> Dance | <input type="checkbox"/> Healthcare and Medical Research | <input type="checkbox"/> Peace/Conflict Resolution | <input type="checkbox"/> Theater |
| <input type="checkbox"/> Demilitarization | <input type="checkbox"/> Homelessness and Housing | <input type="checkbox"/> Philanthropy and Volunteerism | <input type="checkbox"/> Women's Rights |
| <input type="checkbox"/> Disability Rights | <input type="checkbox"/> Human Rights | <input type="checkbox"/> Population Control | <input type="checkbox"/> Youth Development |
| <input type="checkbox"/> Disaster Relief | <input type="checkbox"/> Hunger | | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Drug & Alcohol Abuse | | | |
| <input type="checkbox"/> Domestic Violence | | | |

Why are the selected issues most meaningful?

5. How do you see your core values and important issues coming together in your philanthropy?

For example, imagine your core values are equality, dignity and creativity and your important issues are education, the arts and children. You might see a connection that in order to promote equality and dignity to children, you want to promote after school programs.

6. Is there any one person or organization that you owe a debt of gratitude to?

7. When you think about our world and society, what inspires or excites you?

8. When you think about our world and society, what upsets or angers you?

9. If you could wave a magic wand and make a difference in the world, what would you change? How would the world be different? Be as specific and descriptive as you can.
