This Giving Guide will lead you through exercises that help you:

- Review Your Past Giving
- Consider Your Charitable Motivations
- Record Your Values
- Identify Your Interest Areas
- Define Your Community
- Set Your Giving Guidelines
- Establish Your Specifics
- Document Your Absolutes
- Formulate Your Giving Plans
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     Independence     Self-Reliance
Creativity  Inclusion     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

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.

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_________________________________________________________________________________________
Find the interest areas that matter most to you. Start by circling areas you like and crossing out areas that do not interest you. Then, try to narrow your focus to three areas.
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.

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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:**
- 50% allocated by Parents
- 25% allocated by Child #1
- 25% allocated by Child #2

**Corporate Example:**
- 25% allocated by Executive Team
- 75% reserved for Employee Matching Gifts

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

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

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

Use this graph to illustrate your own giving guidelines.

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*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 ________.
Formulate Your Giving Plans

After looking back at your previous responses, you may wish to formalize a giving plan or mission statement to clarify your goals and priorities. Or, you can use this section to simply record your thoughts on giving.

Some questions to ponder:

- Did anything surprise you?
- Do you plan to make any changes after completing this Giving Guide?
- Is there anything you would like to share with future generations?
- Did a mission statement emerge?

Example:

Mission Statement
We seek to improve literacy levels in our community. We do this by supporting adult and child literacy programs through donations and volunteering to tutor youth and adults.
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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