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

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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## 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

### 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

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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.

_____________________________________________________
___________________________________________________
________________________________________________
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.

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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:**

- **Community (50%)**: Set aside money for ongoing charitable obligations to religious institutions, alma maters and other organizations you wish to regularly support.
- **Impulse (25%)**: Reserve some funds so you can say yes to friends who ask for your support, or answer a particularly moving request.
- **Passions and Priorities (25%)**: Focus your giving on one or two organizations for maximum impact.

**Corporate Example:**

- **Community (25%)**: Allocated by Parents
- **Impulse (25%)**: Allocated by Child #1
- **Passions and Priorities (50%)**: Allocated by Child #2

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 __________.
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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