

What are your *charitable goals?*

1. What matters most to you?

- ☐ Education
- ☐ Health & wellness
- ☐ Arts & culture
- ☐ Environment
- ☐ Youth & families
- ☐ Faith-based causes
- ☐ Animal welfare
- ☐ Economic mobility
- ☐ Community development
- ☐ Other _____

2. How do you currently give?

- ☐ Annual donations to nonprofits
- ☐ Volunteering time or expertise
- ☐ Supporting events
- ☐ Family giving traditions
- ☐ Other _____

3. What is your giving style?

- ☐ I prefer flexibility
- ☐ I prefer focus
- ☐ I want to give now
- ☐ I want to give later
- ☐ I want to do both

4. What impact do you want?

- ☐ Support immediate needs
- ☐ Create lasting change
- ☐ Leave a legacy for future generations
- ☐ Involve my family in giving decisions
- ☐ Other _____

5. Financial Priorities

- ☐ Maximize tax benefits
- ☐ Keep giving simple and efficient
- ☐ Build something permanent
- ☐ Other _____

6. Next Steps

Would you like to explore:

- ☐ Donor-Advised Fund (flexible giving vehicle)
- ☐ Community Good (unrestricted)
- ☐ Designated Fund (supporting specific organizations)
- ☐ Field-of-Interest Fund (supporting a cause area)
- ☐ Planned Gift / Legacy Giving
- ☐ Not sure, I'd like to learn more!

Notes:

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For use by financial advisors with clients. These questions are meant to spark conversation, not to be a rigid form. Use the ones that feel natural for your client.

1. Values and Motivation

- What causes or issues matter most to you and your family?
- Are there specific organizations or communities you feel connected to?
- Have you given to charitable organizations in the past? What motivated that giving?

2. Current Giving Practices

- How do you currently support charities or community causes?
- Do you prefer to give regularly, respond to needs, or make occasional larger gifts?
- Do you involve your family in your giving decisions?

3. Goals and Impact

- When you think about your charitable giving, what impact do you want to have?
- Would you like your giving to focus on immediate needs, long-term change, or both?
- Is it important to you that your giving continues beyond your lifetime?

4. Financial Considerations

- Are there tax advantages you'd like to explore through charitable giving?
- Would you like flexibility in choosing which charities to support each year, or would you prefer to provide ongoing support for specific organizations or causes?
- Are you interested in options to make gifts now, through your estate, or both?

5. Next Steps

- Have you considered creating a charitable fund, such as a donor-advised fund, to manage your giving?
- Would you like to learn more about how the Community Foundation can help align your charitable goals with effective giving strategies?