



Giving Plan For Couples

The questions below can serve as a guide to help you as a couple become more intentional about your charitable giving. You may wish to review the questions individually first and come together afterwards to discuss the topics. Or if you typically give separately, responding first and coming together to review each other's responses may feel more appropriate — or somewhere in between. Use this roadmap however you feel best aligns with your particular approach to charitable giving.

- What motivates me (us) to give?

- What values do I (we) hold dear?
 - 1.
 - 2.
 - 3.
- The issue(s) that I (we) care about most are:
 - 1.
 - 2.
 - 3.
- Does my (our) charitable giving reflect the values and issues about which I (we) care most deeply? If I (we) analyzed my giving over the past year or two, how would it match up with those values and issues?

- (Develop a personal mission statement for your philanthropy. It may help to reference the top three values and issues identified above.) To effect the change I (we) wish to see in these areas, my (our) philanthropic mission is:

- I (we) want to give my (our) time, talent, treasure, testimony and ties to the organizations about which I (we) care deeply. In the coming year, I (we) intend to allocate my (our) resources in this manner:

» Time: _____ hours per week/month/year/other _____

» Talent: My (our) areas of expertise are _____. I (we) can share them by _____.

» Treasure: Last year, my (our) charitable contributions totaled \$_____. This year I (we) plan to give \$_____.

» Ties: I (we) will tell ____ people about this _____ cause/organization. I (we) will advocate for the causes I (we) care about _____ times this year on social media or in some other way.

» Testimony: This year, I (we) will reach out to the organizations I support and ask them how I can spread the word — whether through social or by providing a testimonial for them to use in their materials.

- The specific organizations I (we) will support next year include:

- How do these organizations reflect my (our) values and mission statement?

» What connects me (us) to these organizations?

» Why do I (we) support these organizations?

» How often do I (we) plan to support them?

- I (we) plan to allocate the majority of my (our) gifts (check one):

monthly quarterly semi-annually annually

- How much am I (are we) comfortable giving without consulting one another?
- I (we) plan to review our charitable giving plan together (check one):
 - monthly
 - quarterly
 - semi-annually
 - annually
- Who else, if anyone, might I (we) want to involve in my (our) giving plan?
Should I (we) consult a philanthropy or financial advisor, for instance?
- (If you have children) How should our children be involved in our family's charitable giving?
How do I (we) talk about philanthropic matters, and model/encourage giving behavior?
- In thinking about the impact of my (our) cumulative gifts to one of my (our) funding priorities, how would I (we) like to be remembered for my (our) philanthropy?

For Discussion

- What is your earliest philanthropic memory?
- Who is your philanthropic role model?
- What causes resonate most deeply with you? To what extent does your current philanthropy reflect those concerns? [i.e., if you examined your transaction history, would those causes rise to the top?]
- If you had a magic wand and could effect change in one area with your philanthropy, what would that be? What would you like to see as an outcome? What resources can you bring to bear in this area?
- Think about your philanthropy as a lifelong pursuit. What do you hope to accomplish in your lifetime through your philanthropy?

Identifying Priority Values and Issues

Here are a few helpful lists to reference as you create your giving plan. To identify your priority values and issue areas, you can also start by thinking about a specific organization you support, and why this organization and its mission are so important to you.

VALUES

- Community
- Compassion
- Courage
- Creativity
- Determination
- Diversity
- Empathy
- Equality
- Excellence
- Fairness
- Faith
- Family
- Freedom
- Generosity
- Good sense
- Hard work
- Harmony
- Healing
- Honesty
- Humility
- Independence
- Innovation
- Integrity
- Interdependence
- Justice
- Knowledge
- Leadership
- Love of comfort
- Love of others
- Loyalty
- Patience
- Peace
- Preservation
- Respect
- Self-Discipline
- Self-Respect
- Service
- Simplicity
- Spirituality
- Stability
- Teamwork
- Thrift
- Tradition
- Transformation

ISSUE AREAS OR CONCERNS

- Aging
- Animals and species preservation
- Anti-Racism
- Arts and art institutions
- Biodiversity
- Boys
- Catholic charities
- Child care
- Civil rights
- Coexistence
- Community gardens
- Computer literacy
- Cultural heritage
- Death and dying
- Demilitarization
- Disability rights
- Disaster relief
- Domestic violence
- Drug/alcohol abuse
- Economic justice
- Education
- Elder care
- Electoral reform
- Job creation
- Environment
- Faith-based community service
- Girls
- Global climate change
- Gun control
- Health care and prevention
- HIV and AIDS
- Homelessness
- Homophobia
- Human rights
- Immigrant and refugee rights
- International development
- Islamic causes
- Jewish causes
- LGBTQ rights
- Libraries
- Literacy
- Media
- Medical research
- Native and indigenous people's rights
- Nutrition
- Parks and land preservation
- Peace or conflict resolution
- Philanthropy
- Poverty
- Prison reform
- Public policy
- Religion
- Reproductive rights
- Science and technology
- Spiritual development
- Sports and recreation
- Sustainability
- Women's leadership
- Youth development

