Defining Charitable Priorities
A guide to meaningful, personal giving

Many people come to a point in their lives where they want to give back, but they have a difficult time sorting out thoughts.

What motivates you to give? Perhaps you feel strongly about a cause. Perhaps an organization has touched your life or the lives of loved ones. Maybe you want to create a legacy and set an example that inspires others to give. Or your giving is a way to bring your family together and pass along your values to younger generations.

The key to having a rewarding experience is finding the best fit for your charitable priorities, financial goals, and personal experiences. This checklist is designed to help you determine the giving solution right for you.

What are your charitable priorities?
Charitable interests. You may have a single interest or several...or a desire to support new community needs and opportunities as they arise. Check all that apply.

- Hometown community
- Seniors
- Alma mater
- Faith organization
- Environment
- Arts
- Education
- Health and Human Services
- Youth
- Other ________________________________

Impact. What kind of impact do you hope to make with your charitable gift?

- Help the largest number of people possible.
- Make a difference in the lives of a few each year.
- Construct or maintain facilities or grounds that will endure for generations.
- Support operations of not-for-profit organizations.
- Address long-term social or health issues.
- Ensure that basic needs are available to area citizens.
- Provide something special in the community.

Other ________________________________
Perpetuity. Should your gift help the community forever? You can endow your gift so that only earnings may be spent and the principal becomes a growing source of community capital or you can choose to have the gift spent.

☐ Preserve my gift. Earnings may be used for the charitable purpose I have selected.
☐ I want all gifts to be disbursed to charitable organizations immediately or over time.
☐ A portion of the gift may be spent under certain circumstances.

Involvement. Do you want an active grantmaking role for yourself or your family? Instead, would you prefer to make a gift with no future demands on your or your family’s time?

☐ I would enjoy continued involvement with a charitable fund I have established.
☐ Involvement of my children and grandchildren will help me pass along a legacy of charitable giving.
☐ I do not plan to have continued involvement.