



THE COMMUNITY FOUNDATION  
*of Shelby County*

*Build Today...Dream for Tomorrow*

## 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.

- |   |  |
|---|--|
| <input type="checkbox"/> Hometown community | <input type="checkbox"/> Arts                      |
| <input type="checkbox"/> Seniors            | <input type="checkbox"/> Education                 |
| <input type="checkbox"/> Alma mater         | <input type="checkbox"/> Health and Human Services |
| <input type="checkbox"/> Faith organization | <input type="checkbox"/> Youth                     |
| <input type="checkbox"/> Environment        | <input type="checkbox"/> 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.