



The Community Foundation of Shelby County

Defining Charitable Priorities

A Guide to Meaningful, Personal Giving

What motivates your giving? Perhaps you feel strongly about a cause. Or maybe an organization has touched your life or the life or 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 a rewarding giving experience is finding the best fit for your charitable priorities, financial goals, and personal experiences. **This checklist is designed to help you determine and define your charitable priorities and find which giving solution is right for you.**

Charitable Interests. *Please 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? Or would you like it to spend down over time?*

- 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 grant-making role for yourself or your family? Or 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.

To inspire donor generosity and transform it into meaningful, lasting impact through charitable gifts.