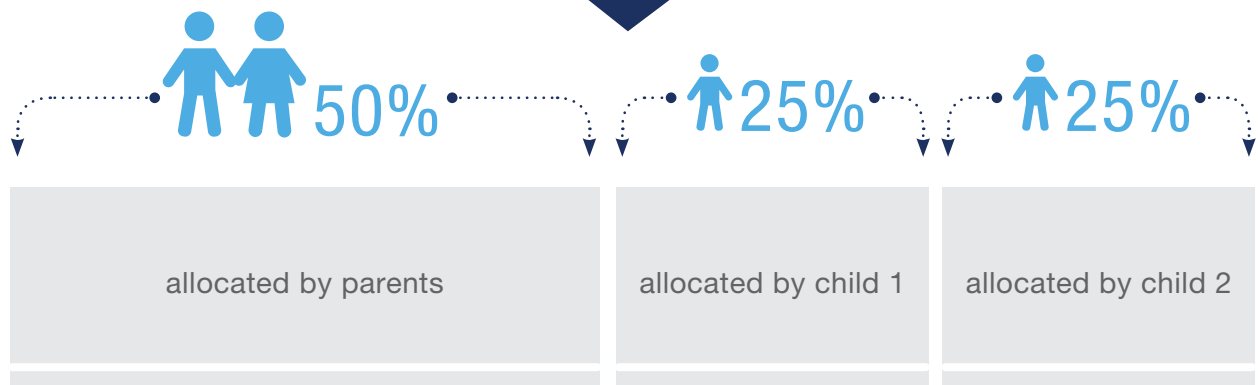




DEFINE YOUR Giving Guidelines

You may consider dividing your giving, allocating percentages for each area. Or, you may prefer to set guidelines for others who may participate in your giving.

FAMILY EXAMPLE



CORPORATE EXAMPLE



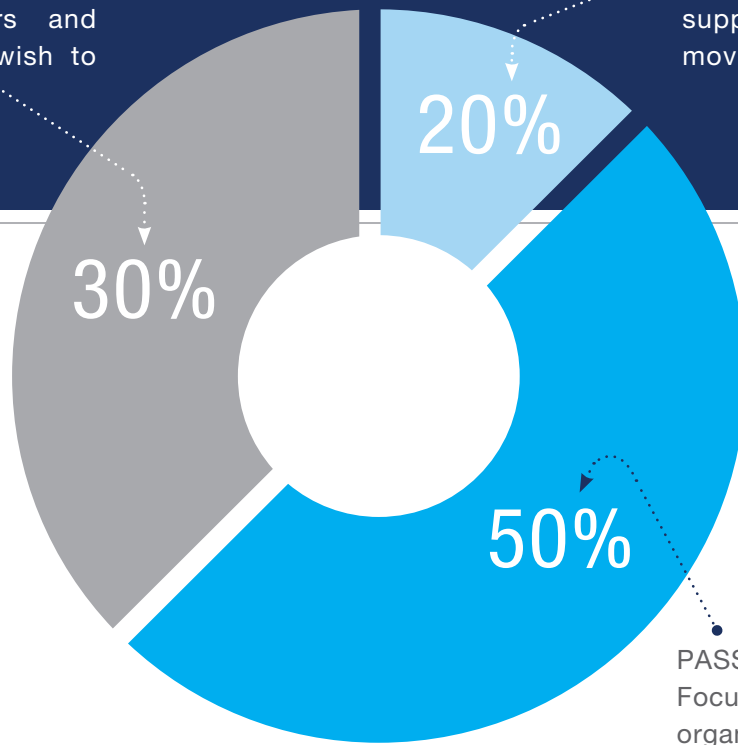
EXAMPLE

COMMUNITY

Set aside money for ongoing charitable obligations to religious institutions, alma maters and other organizations you wish to regularly support.

IMPULSE

Reserve some funds so you can say yes to friends who ask for your support, or answer a particularly moving request.



PASSIONS AND PRIORITIES

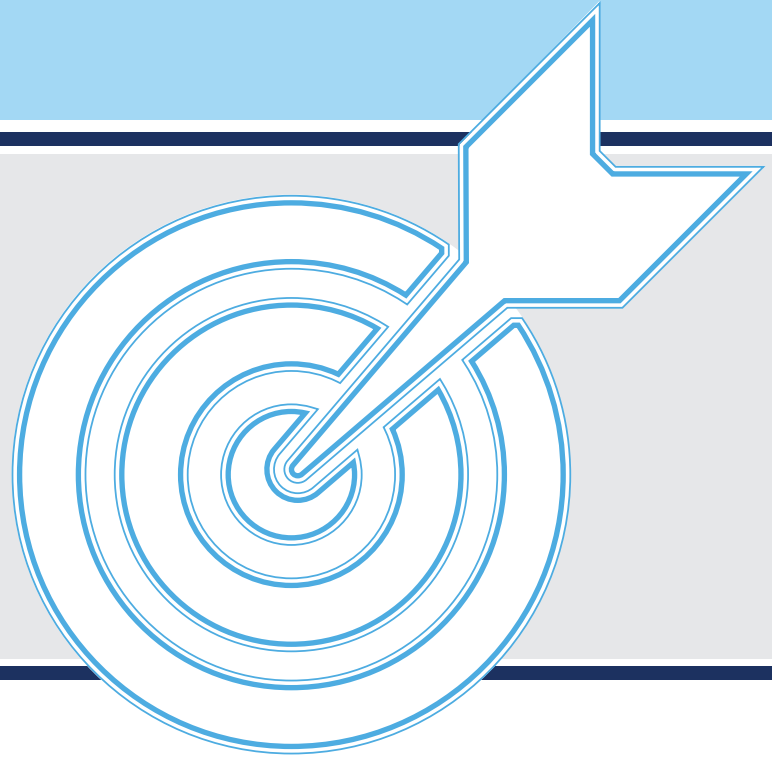
Focus your giving on one or two organizations for maximum impact.

Use this graph to illustrate your own giving guidelines.



**The "50/30/20" Rule for Fulfilled Giving: Jason Franklin, Ph.D.*

Establish Your Specifics



You may want to identify specific causes or organizations you feel strongly about supporting.

EXAMPLES

We believe in the importance of public education, at both K through 12 and higher education levels. We support the School District Education Foundation and the State University.

We are interested in visual and performing arts. We wish to support the Museum and the Orchestra.

Document Your Absolutes



You can choose to outline more stringent rules for your giving.

EXAMPLES

We will only support programs benefitting our metro area.

Under no circumstances will we support organizations that:

Formulate Your **GIVING PLANS**



After looking back at your previous responses, you may wish to formalize a giving plan or mission statement to clarify your goals and priorities. Or, you can use this section to simply record your thoughts on giving.

SOME QUESTIONS TO PONDER:

Did anything surprise you?

Do you plan to make any changes after completing this Giving Guide?

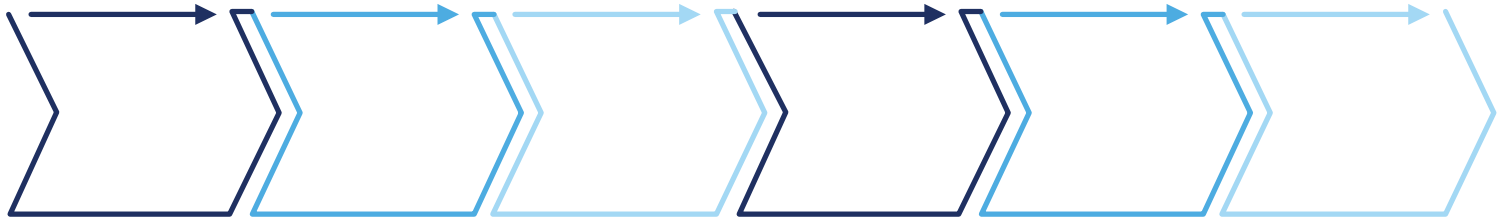
Is there anything you would like to share with future generations?

Did a mission statement emerge?

EXAMPLES

MISSION STATEMENT

We seek to improve literacy levels in our community. We do this by supporting adult and child literacy programs through donations and volunteering to tutor youth and adults.



NEXT STEPS

Think of this Giving Guide as a living document. You can come back periodically and make updates as you evolve in your giving, and it can serve as a reminder or motivation as you make your charitable decisions.

If you want assistance carrying out your giving plans, we can help organize and maximize your charitable gifts through a charitable giving account, also known as a donor-advised fund. Charitable giving accounts allow you to maximize your giving, simplify your donations and give to the causes you love.





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