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A Workbook For Your Charitable Giving

Giving Guide

THE
COMMUNITY
FOUNDATION

MARTIN
ST. LUCIE

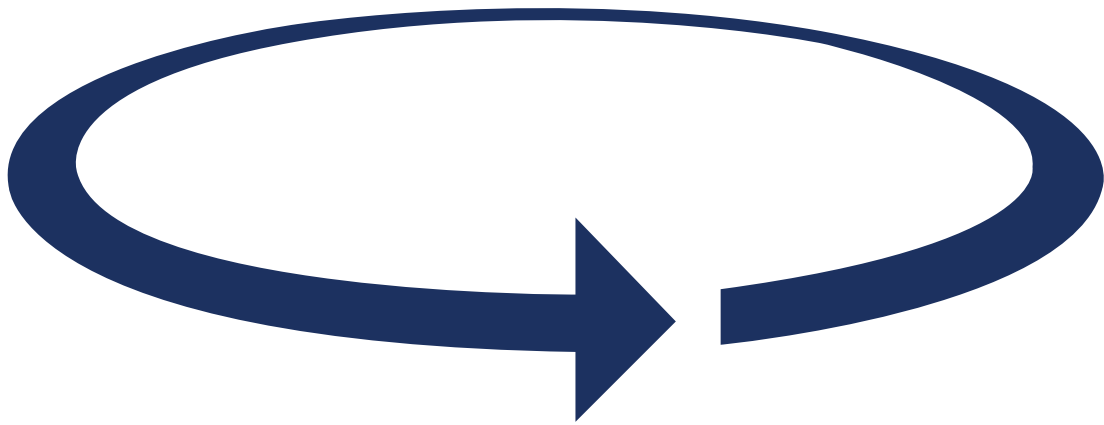
The Giving Guide

will lead you through exercises that help you:



Reviewing Your Past Giving

Giving happens in many forms. You can donate your time and talents through volunteering, or you can use your financial resources to support causes you care about. Look back at your past giving to determine if your giving aligns with your interests or if you want to change course.



What organizations do you support and how do you support them?

What was your most meaningful or rewarding charitable investment or volunteer experience?

What was your most disappointing charitable moment?



CONSIDER

YOUR CHARITABLE MOTIVATIONS

.....
Take a moment to think about the following questions. Add any thoughts that might direct your charitable investments.

How would you improve the world? _____

What makes you happy? _____

What makes you sad? _____

Do you want to help today, focusing on immediate needs? _____

Do you want to address root causes and seek long-term solutions? _____

What do you believe is the best use of your charitable dollars? _____

What results do you want your charitable investments to achieve? _____

Record YOUR VALUES



WHAT DO YOU VALUE MOST?

Start by circling values that resonate with your core principles and crossing out those that have little influence on your life.

Acceptance	Democracy	Family	Knowledge	Responsibility
Access	Dignity	Freedom	Leadership	Security
Acknowledgement	Diplomacy	Generosity	Love	Self-Expression
Activity	Discipline	Happiness	Loyalty	Self-Reliance
Beauty	Diversity	Harmony	Merit	Service
Change	Education	Healing	Movement	Simplicity
Collaboration	Empathy	Honesty	Opportunity	Stability
Commitment	Empowerment	Humility	Passion	Stewardship
Communication	Energy	Inclusion	Patriotism	Sustainability
Community	Entrepreneurship	Independence	Peace	Tolerance
Compassion	Equity	Innovation	Personal Growth	Transformation
Competition	Excellence	Integrity	Preservation	Truth
Conservation	Expertise	Involvement	Pride	Versatility
Courage	Fairness	Joy	Privacy	Wisdom
Creativity	Faith	Justice	Respect	

OF THE VALUES YOU CIRCLED,

which three hold the greatest impact or meaning to you? Feel free to add values that were not listed on the previous page.

Identify Your INTEREST AREAS



Arts & Culture
Literary
Performance
Visual

Animal-Related
Animal Protection & Welfare
Wildlife Protection
Zoos & Aquariums

Civil Rights & Advocacy

Community Improvement

Crime & Legal-Related

Diseases, Disorders
& Medicine
Medical Research

Disaster Preparedness
& Relief

Education
Preschool
Elementary & Secondary
Higher Education

Employment
Job Training & Placement
Vocational Counseling

Environment
Botanical
Natural Resources
& Conservation
Recycling
Water

Food, Agriculture
& Nutrition
Agriculture Programs
Food Banks & Pantries
Meal Delivery

Health
Health Care Delivery
Mental Health
& Crisis Intervention
Substance Abuse

Housing & Shelter
Home Improvement & Repairs
Homeless Shelters
Senior Housing
Subsidized Housing

Human Services
Aging
Children, Youth & Family Services
Domestic Violence

International Affairs
& National Security

Philanthropy
& Volunteerism

Recreation & Sports

Religion-Related

Science & Technology
Astronomy
Biological & Life Sciences
Chemistry
Computer Science
Engineering & Technology
Marine Science & Oceanography
Physical & Earth Sciences

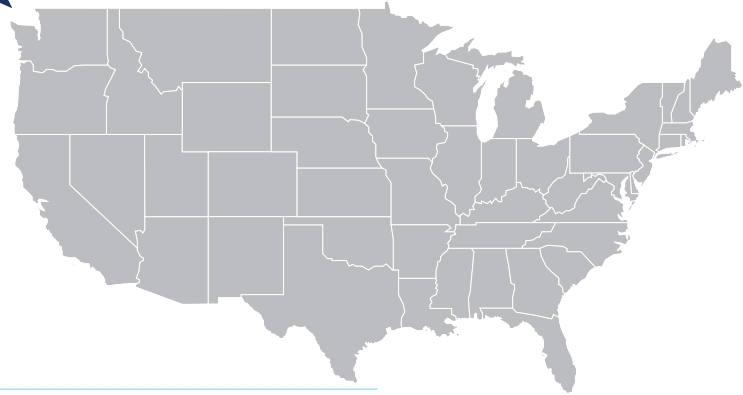
Youth Development
Youth Centers
Service Clubs

Find the interest areas that matter most to you. Start by circling areas you like and crossing out areas that do not interest you. Then, try to narrow your focus to three areas.

Define Your Community



Consider the community or communities you want to support. This could mean a geographic area or a population, for example, individuals with disabilities, religious groups, the elderly, or causes related to animals. Are there specific cultures or regions you care about? Circle or list specific countries, populations or community groups.

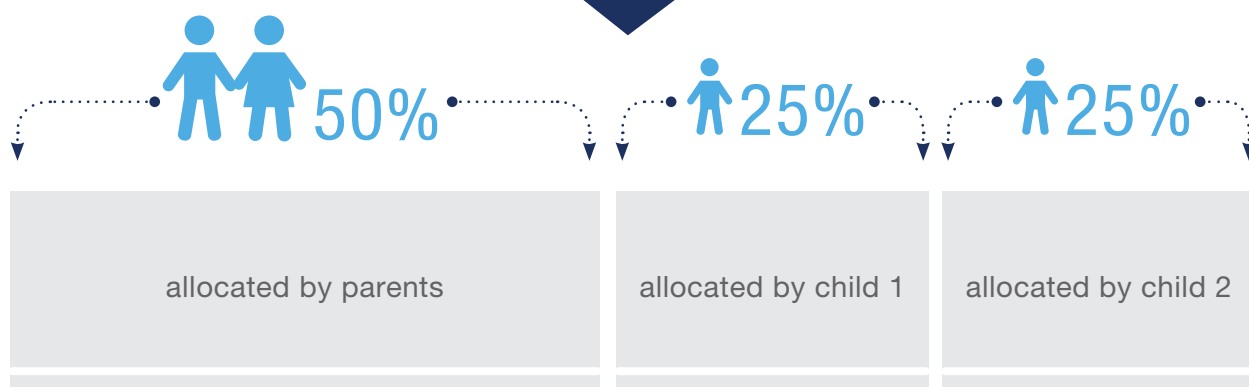




DEFINE YOUR Giving Guidelines

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



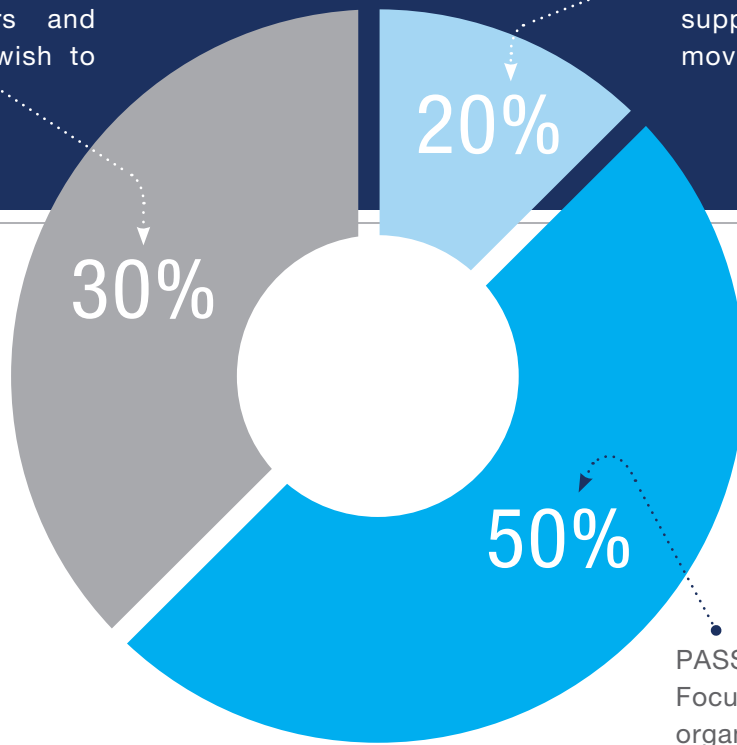
EXAMPLE

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

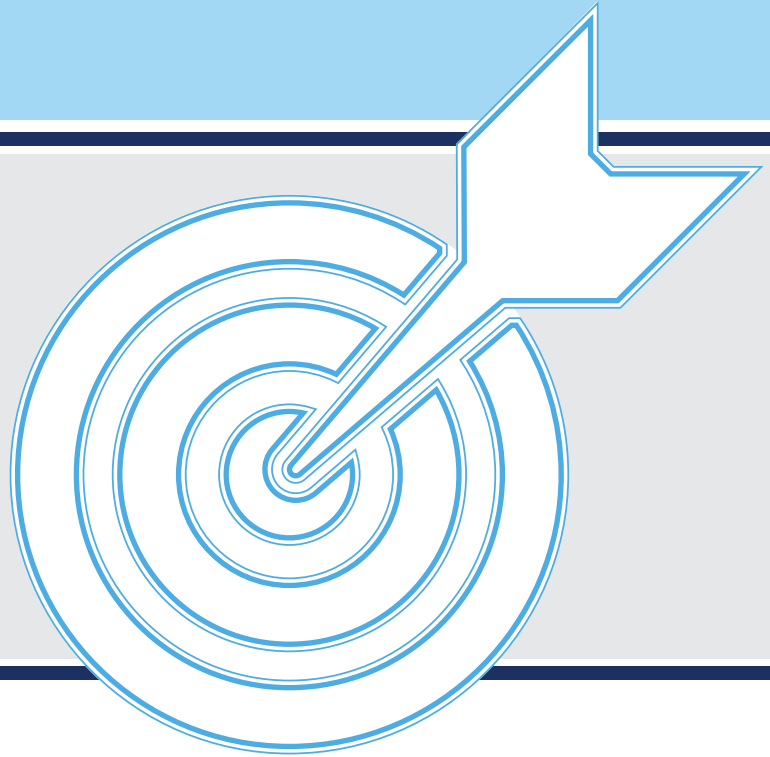
Focus your giving on one or two organizations for maximum impact.

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?

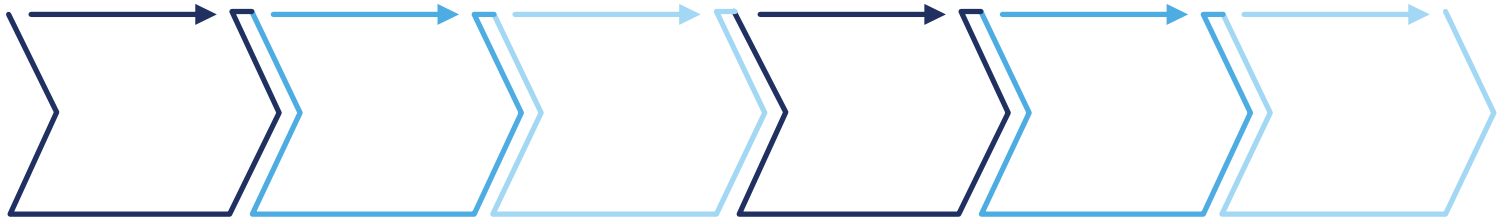
Is there anything you would like to share with future generations?

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

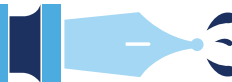
Think of this Giving Guide as a living document. You can come back periodically and make updates as you evolve in your giving, and it can serve as a reminder or motivation as you make your charitable decisions.

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.





Leave a personal legacy that lasts forever



Since 1988

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Contact us to learn more.

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