

A GUIDE TO GIVING

As the end of the year approaches, perhaps you are considering making a charitable gift. Many people come to a point in their lives where they feel inclined to give back. They do so for a number of reasons, all very personal to them. 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 inspire others to give. Or your giving may be a way to get your family together and pass along your values to younger generations.

For as many motivations as there are to give, there are ways of giving. The key to having a rewarding giving experience is finding the best fit—for your charitable priorities, financial goals, and personal preferences. This checklist is designed to help you and your professional advisor determine your custom giving preferences.

WHAT ARE YOUR FINANCIAL GOALS?

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| Charitable Interests | Can you identify one or more charitable interests, new community needs, or other opportunities as they arise? |
| Impact | What kind of impact do you hope to make with your charitable gift? |
| Duration | You can endow your gift so that a portion of earnings is spent and the gift remains a permanent source of community capital. Or, you can choose to spend all of your charitable assets. Which do you prefer? |

WHAT ARE YOUR PERSONAL PREFERENCES?

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| Ownership | Is substantial management over assets you give to charity important? Some people aren't comfortable without it. Others are glad to let go, once they've made some guiding decisions. Determining the range that's comfortable for you will help your professional advisor(s) recommend appropriate giving vehicles. |
| Involvement | Do you want to play an active role in your giving, involve family members, or make a one-time gift with no future demands on your time? |
| Recognition | Some like a tasteful level of recognition for their good work. It attracts attention to their cause, generates awareness, and may inspire others to give. Some people prefer anonymity. Which do you prefer? |

PLANNED GIVING HELP

The Community Foundation has three giving experts who have received the Chartered Advisor in Philanthropy® (CAP®) professional designation from the Richard D. Irwin Graduate School of the American College, Bryn Mawr, Pennsylvania. This designation increases the Community Foundation's ability to work with donors by providing the knowledge and tools needed to assist donors in reaching their charitable giving objectives while also helping donors meet their estate planning and wealth management goals.

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