

Questions for the Charitable Planning Process

Please take a moment and answer the questions below. The answers to these questions can not only help you in your planning, but can help you focus your energy and resources.

What do you feel passionate about?

How would you like to have your gifts managed?

Have you ever made a gift and then been disappointed with what was done with it?

Have you looked into the various ways that you can help charity?

How does your spouse feel about gifting?

Do you and your spouse agree on where gifts should go?

How do your children feel about gifting? Have you discussed gifting with them?

Do you have any existing gifting tools in place?

If there were no financial restrictions, how much would you want to give?

Are you aware of how gifting to charity can also be a benefit to you and your family?

Are you aware that there are gifting tools that can eliminate taxation on appreciated property?