

# Philanthropy is for Everyone

## Family Giving Planner

Your family wants to support the causes that are most important to you, but it can be hard to know where to start.

*How much can we afford to give?*

*How does our volunteerism come into play?*

*How do we know what charities we can trust?*

This planner can guide you through a discussion about what's important to everyone in your household and how you want to give. Stop feeling overwhelmed by all the needs out there and start feeling more confident that you're making a difference in your community – **your way**.



**Who are the givers in this household?**

|  |  |  |  |  |
|--|--|--|--|--|
|  |  |  |  |  |
|--|--|--|--|--|

**Volunteer**

|                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|

**Donate Monetarily**

|                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|

**Donate Goods**

|                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|

**Spread Awareness**

|                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|

**Fundraise For Charity**

|                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|



**If we had a million right now to give, how would we like to change the world?**



**What are the top three charities or interest areas that are most meaningful to us? How can we be confident that these are trustworthy orgs?** *Tip: Review independent sources.*

**Charity Name #1** \_\_\_\_\_ ☐ Candid.org ☐ Charity Navigator ☐ BBB

**Charity Name #2** \_\_\_\_\_ ☐ Candid.org ☐ Charity Navigator ☐ BBB

**Charity Name #3** \_\_\_\_\_ ☐ Candid.org ☐ Charity Navigator ☐ BBB

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How much would we like to give annually this year? .....

How much would we like to be able give 5 years from now? .....

How much would we like to be able give in retirement (if not yet retired)?.....

*Tip: An annual goal may be too overwhelming to think about. Breaking it down monthly can help.*

~~\$5,000-~~    ~~\$1,000-~~    ~~\$250-~~  
*\$416 mo.    \$83 mo.    \$21 mo.*

~~\$2,500-~~    ~~\$500-~~    ~~\$100-~~  
*\$208 mo.    \$42 mo.    \$8 mo.*

## FROM THE EXPERT



The flexibility and predictability allows monthly donors to have a greater impact than they could giving only once a year. "Monthly donors give almost three times more."

*- Erica Waasdorp*

Author, **NonProfitPRO**

✓ *Organization Name*

### Action Steps

Contact \_\_\_\_\_ to volunteer. *Person responsible: \_\_\_\_\_*

Go to \_\_\_\_\_ website / Write a check to donate. *Person responsible: \_\_\_\_\_*

Follow \_\_\_\_\_ on social media to spread awareness. *Person responsible: \_\_\_\_\_*

Contact \_\_\_\_\_ to see what items they need the most. *Person responsible: \_\_\_\_\_*

Start a fundraiser for \_\_\_\_\_ on social media. *Person responsible: \_\_\_\_\_*

Other: \_\_\_\_\_ *Person responsible: \_\_\_\_\_*