

Guide to Giving

There are so many important causes and opportunities to support our community. Thinking through your gift will help ensure you have the most impact and meet your goals.

Getting Started

Determine your charitable giving options, interests, values and aspirations.

1. Have you ever considered charitable giving? (Why or why not?)
2. From your experience, what makes a fulfilling charitable gift?
3. If money wasn't a concern, what charitable gifts would you make today? What might you plan for the future?
4. Do you like the idea of letting an organization decide how to use your gift or do you prefer to determine exactly how your gift should be spent?
5. Are you interested in supporting organizations or causes during your lifetime? Do you wish to provide support after your passing?
6. How would you like your family to be involved in your charitable giving and decisions?
7. Would you like family members, friends or future generations to continue your giving legacy?

Making a Plan

Clarify your areas of interest.

1. Are you currently involved with any charitable organizations as a donor, volunteer or member?
2. What strengths do you see in our community that you would like to support?
3. What weaknesses in our community do you think need attention?
4. Do you have a vision for our community?

Next Steps

Now that you're thinking about how and where you want to give, it's time to start making a plan.

A professional advisor can help you decide the giving options that best meet your financial needs and philanthropic wishes. We are happy to work with you, or in partnership with your professional advisor, to make your dreams for our community a reality.