

Create Your Personal Giving Plan

"Give generously but not indiscriminately. Select carefully those worthy to receive your gifts."

--Lucius Anneaus Seneca (4 BC)

A Personal Giving Plan is a way of looking at your charitable giving and putting yourself in the drivers' seat. It may help with how you look at your annual gifts from cash flow or potential planned giving from your net worth or from your estate.

1. What are your values?

What are your extra-curricular interests or passions?

What issues have attracted your volunteer time and energy?

Name three of your key personality traits – circle them or come up with your own:

Creative	Funny	Athletic	Academic
Street Smart	Outgoing	Faithful	Truthful
Organized	Helpful	Smart	Thoughtful
Dramatic	Loyal	Musical	Goal Oriented
Reliable	Careful	Faithful	Empathetic
Smart	Generous	Caring	Fair

Other:

What issues were heightened for you by personal experiences?

What charitable organizations have you benefited from?

Rank the values you think are important for our society.

Least imp Med. Most important

- Security
- Fun
- Safety
- Health
- Family
- Religion
- Friendships
- Success
- Peace
- Freedom
- Responsibility
- Sense of Humour
- Human Dignity
- Justice
- Respect
- Community
- Compassion
- Diversity
- Equality
- Service
- Creativity
- Excellence
- Self-Fulfillment

In your obituary, what would they say is unique about you?
What would you like to be remembered for?

What influences you most when you volunteer your time or money?

	Least	Med	Most
	<u>Influential</u>		<u>Influential</u>
My parents are involved			
It's family tradition			
My children are involved			
My church is involved			
My friends are involved			
My co-workers			
It's fun			
It's easy			
It makes sense			
I have benefited			
It benefits me in return			
It's good for business			
It keeps me in shape			
It keeps my mind active			
I'm able			
It looks good on my resume			
It makes sense			
It feels right			
The need is great			
It's God's will			

2. What Are the Causes Important to You?

Rank the following categories in importance to you:

1 2 3

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- Healthcare
 - Disease research
 - Hospitals
 - World Emergency Relief
 - Local Foodbank
 - Poverty relief
 - Homeless
 - Education
 - Literacy
 - Animal Rights
 - Environment
 - Social issues
 - Women's issues
 - Youth issues
 - Child/childcare
 - Seniors issues
 - Disability rights
 - Sports/Fitness
 - Recreation
 - Racism
 - Drugs and alcohol abuse
 - Arts & Culture
 - Theatre/Music
 - Cultural Heritage
 - Religious organization
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After looking over your responses to these questions, you may have a better idea of what's important to you, and why, and what causes you would like to support.

Name your three highest concerns:

3. What Is Your Goal?

Remember, this is personal, between you and your spouse. It should not be determined by in-laws or outside organisations or least of all fundraisers.

Your giving plan can address annual gifts from cash flow
Or potential planned giving from your net worth.

Annual Giving

What amount of money do you need from current cash flow to maintain your lifestyle?
What cash flow do you need to be content? What money do you need to secure your future financially? Think about the causes close to your heart and the charities that you would like to support.

Check last year's tax return.

What dollar amount did you donate last year? _____

What was that as a percent of total income? _____

Have your values or passions changed?

How has your income changed?

Did you have any unexpected income?

How have your expenses changed?

Are there opportunities you've missed with gifts in-kind?

Set a dollar figure that you would like
to give to charity this year. _____

Planned Giving:

Planned giving is ensuring a donation is made from your net worth in the future, usually when you pass away.

Your current Net Worth _____

Estimate of possible Net Worth at death _____

Funeral costs and other final expenses _____

Potential tax liabilities at death _____

(deemed disposition on RSPs, RIFs, or other property)

Life Insurance and assets that go directly _____

To beneficiary and not through your Estate _____

Property that may pass to joint owner _____

And not go through your Estate _____

Estimated needs of surviving spouse?

Estimated needs of dependant children?

Are your children grown and financially independent?

Any particular property or assets that lend themselves to a planned gift (i.e. appreciated securities, listed personal property, or certain real estate lands)

Think about your values and concerns as identified and your giving personality.

Look at the giving strategies section of this site. Which strategies would you be able to take advantage of? Which charitable giving tools are suitable to you, your financial situation, the charities you want to support, and your life goals?

4. What Is Your Plan?

Research the specific organisations within these categories. Can you look at their annual report? Which ones are set up to receive the type of donation you wish to make? Which ones give you the type of recognition you wish to receive? Which charities share the values you identified?

Research your favourite charities using the resources and links on this site. How will the charity use your donation? Are you as a donor able to designate the gift to a particular area of the charity's work? Does the charity give you continuing information and updates on the work and your impact? What are the charity's long-term plans? Are audited financial statements available? What is the charity's privacy policy? What recognition will you receive for your donation?

My top 3 Values:

My top 3 Causes:

Charitable organizations that share my values and address the causes important to me:

The charitable giving tools I plan to use:

The amount I want to give from cash flow this year:

The gift I plan to give from net worth, at death
