

Deciding to give

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. If you are not certain of what you would like to accomplish with your giving, follow these four simple steps to clarify your goals, and then meet with us to further define them:

1. Define your passion.

What issues do you care about?

What organizations do you currently give to?

What gives you the greatest satisfaction?

2. Create your plan.

If you could change three things in your community, what would they be?

Do you prefer to fund buildings, operations, projects?

How much involvement do you want with the causes you support?

3. Determine your giving level.

What are your financial objectives?

What is your tax situation?

What is your charitable comfort level?

4. Implement your strategy.

Prioritize needs, programs, and opportunities.

Determine the best giving instruments to accomplish your financial goals.

Make gifts and grants.