

# Giving Vehicles

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The table below contains three broad categories for charitable giving vehicles. This general overview aims to introduce three basic categories of giving vehicles and a few examples. If you would like to learn more about giving vehicles please visit with your wealth advisor and the sources for this document at [Fidelity Charity](#), [Northern Trust](#), and [Charity Navigator](#)

Vehicles	Description	Examples
Outright Gifts	Outright giving is simple and can be done with little planning. Useful if you want to make one-off donations and manage your own donation receipts at tax time.	Writing a check Donating a vehicle Transfer of property
Investment Vehicles	Charitable solutions that are set up like bank accounts that are created and maintained to support one or more organizations over time.	Donor advised funds Endowments Various trusts Family foundations Community foundations
Bequests	Any resource giving at a later date. Typically bequests are a part of a legacy or will.	Specific bequests Percentage bequest Residual bequest

# Personal Resource Profile

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In the spaces below, brainstorm a list the resources you have available to offer charitable organizations. When you think you're done, circle the resources that you want to prioritize, and underline the resources you need more information about from an advisor.

## Financial Capital

Think about: money, stocks, access to a family foundation, company charitable donation matching, etc.

## Intellectual Capital

Think about: professional expertise, skills specific to your background or past experiences, specialized certifications or college degrees, etc.

## Social Capital

Think about: friends, family, colleagues, membership organizations or religious groups you are involved with, volunteer or special interest clubs, etc.

# Personal Giving Plan

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## Giving History

Reflecting on why and how you have given in the past can give valuable insight into how you give moving forward. Use this giving history section to decide which practices to continue and identify any you would like to change.

How frequently do you give?	
Do most of your charitable gifts support specific causes? Are they targeted to your own community or meant to address needs in the larger world?	
Do you give to well-established organizations? Or do you prefer to help newer organizations?	
What spurs you to give? Do you respond to particular types of charitable appeals?	
What did you hope to accomplish by giving? Did you achieve your desired results?	

## What Inspires you to Give?

Understanding what inspires you to give helps you find giving strategies that align with your personal vision. Use this inspiration section to help articulate your personal goals for giving.

Where would you really like to make a difference?	
Would you like your impact to be felt at the individual, organizational, community, or policy level?	
Do you prefer to give to organizations serving local, state, national, or global needs?	
Do you wish to remain anonymous? If not, how would you like to be recognized for your gifts?	
How involved do you want to be in the life of the organization? Do you prefer to provide financial support, sit on boards, or have direct involvement in the day-to-day work of the organization?	

# Giving Mission Statement Summary

The simple exercise of creating your personal giving mission statement involves writing out broad answers to the following questions and then summarizing your answers.

What are the major areas you want to affect through your giving? Why?	
What types of organizations do you seek to support in these areas?	
Are there specific methods or key criteria that will guide your giving?	

## Giving Mission Statement

Developing a mission statement can be both inspiring and powerful. Typically one to three sentences, this statement articulates your giving goals and the methods that will be used to achieve them. A personal and living document, it may change over time as your goals and motivations evolve.

The most effective mission statements are succinct and memorable. They generally consist of three elements:

1. A core vision that guides giving
2. The causes and types of organizations you wish to support
3. Any "methodology" for selecting recipient organizations and measuring success

Using the information you have provided in this document, please write your giving mission statement in one to three sentences.

## My Giving Mission Statement

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Information on this document is created with guidance from Fidelity Charity. More information can be found at <https://www.fidelitycharitable.org/giving-strategies/give/build-your-strategy.shtml>

# Sample Personal Giving Plan

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## Giving History

Reflecting on why and how you have given in the past can give valuable insight into how you give moving forward. Use this giving history section to decide which practices to continue and identify any you would like to change.

How frequently do you give?	Yearly, at the end of the year.
Do most of your charitable gifts support specific causes? Are they targeted to your own community or meant to address needs in the larger world?	Yes. I support local art museums, public radio, a state university scholarship fund, and a local addiction clinic.
Do you give to well-established organizations? Or do you prefer to help newer organizations?	I prefer well-established organizations.
What spurs you to give? Do you respond to particular types of charitable appeals?	I like to hear real stories where I can see the impact of the donation to the organization.
What did you hope to accomplish by giving? Did you achieve your desired results?	I would like to take better care of my community, with all people being happy, healthy, and having the ability to live their best lives.

## What Inspires you to Give?

Understanding what inspires you to give helps you find giving strategies that align with your personal vision. Use this inspiration section to help articulate your personal goals for giving.

Where would you really like to make a difference?	I like to see the community come together in health, art, and education.
Would you like your impact to be felt at the individual, organizational, community, or policy level?	Community
Do you prefer to give to organizations serving local, state, national, or global needs?	I like to give at the local or state level.
Do you wish to remain anonymous? If not, how would you like to be recognized for your gifts?	It depends on the organization. I occasionally give anonymously. If I get recognition, I prefer it to be in someone else's honor.
How involved do you want to be in the life of the organization? Do you prefer to provide financial support, sit on boards, or have direct involvement in the day-to-day work of the organization?	I only have time to provide financial support.



## Giving Mission Statement Summary

The simple exercise of creating your personal giving mission statement involves writing out broad answers to the following questions and then summarizing your answers.

What are the major areas you want to affect through your giving? Why?	I want to enrich the lives of members of the community by contributing to things I love or that inspire me.
What types of organizations do you seek to support in these areas?	Art, education, and rehabilitation.
Are there specific methods or key criteria that will guide your giving?	I give to what gives me inspiration.

## Giving Mission Statement

Developing a mission statement can be both inspiring and powerful. Typically one to three sentences, this statement articulates your giving goals and the methods that will be used to achieve them. A personal and living document, it may change over time as your goals and motivations evolve.

The most effective mission statements are succinct and memorable. They generally consist of three elements:

1. A core vision that guides giving
2. The causes and types of organizations you wish to support
3. Any "methodology" for selecting recipient organizations and measuring success

Using the information you have provided in this document, please write your giving mission statement in one to three sentences.

## My Giving Mission Statement

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To contribute to the betterment of communities and enrich lives by contributing to citizens' access to health care, art, and education.

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# Giving Scenarios

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## Scenario 1 | Kelly

Kelly is a 32-year-old dentist with an income that is normally about \$150,000 per year, but this year he experienced a significant liquidity event due to the sale of his practice, boosting his income this year to \$6 million. Given his newfound wealth, Kelly commits to donate \$600,000 to charities in the coming years (he's not ready to choose where to donate that much money all at once), but is concerned that after his income reverts back to 'normal,' he will be unable to claim a full charitable deduction for his future donations.

Match with (circle):      Nonprofit A      Nonprofit B      Nonprofit C

With what resources?

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## Scenario 2 | Dottie

Dottie is a 65-year-old widow without children. For the past 25 years, Dottie has worked for a software company, and has always contributed as much of her wages as possible to their stock. Today it is worth more than 25 times what she paid for the stock. Dottie plans to make a single big donation to a local women's shelter to avoid capital gains taxed as she diversifies this stock.

Match with (circle):      Nonprofit A      Nonprofit B      Nonprofit C

With what resources?

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## Scenario 3 | Mike

Mike is 41 and recently divorced with two young daughters. Mike owns a large construction company which creates significant taxable income each year in excess of \$5 million. Mike also has significant liquid assets in excess of \$20 million. He wants to donate at least 15% of his yearly income, but does not have a lot of time to manage his donations alone. It is important to Mike that he is able to involve his daughters in his giving decisions, and that he have the ability to eventually pass this giving on to them to manage.

Match with (circle):      Nonprofit A      Nonprofit B      Nonprofit C

With what resources?

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## Scenario 4 | Lewis & Carroll

Lewis and Carroll's estate attorney recently suggested they start looking into charitable planning resources. They always planned to leave their estate to charity and just haven't put the plans in place since their adult children left home and began their own careers as strategy consultants. Lewis is passionate about mental health rehabilitation and Carroll's passion is fighting addiction and would like to create a legacy for the community.

Match with (circle):      Nonprofit A      Nonprofit B      Nonprofit C

With what resources?

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## Scenario 5 | Sarah

Sarah is a young professional working in social media and marketing. She is new to philanthropy and gives when she sees opportunities at organizations that interest her. She tends to give to organizations where she can see the real impact of her dollars at work and cares greatly about the stories of individuals benefiting from the organizations' work. She participates in monthly service projects with a group of other young professionals.

Match with (circle):      Nonprofit A      Nonprofit B      Nonprofit C

With what resources?

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## SVP Philanthropy Curriculum | Course Evaluation

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1. What was your biggest takeaway from the workshop?

2. What worked particularly well for your learning style?

3. What missed the mark?

4. How will you use this information going forward in your social purpose work?

5. Was the content of the workshop challenging? (Circle One)

Too Basic      Somewhat Basic      Just Right      Challenging      Too Challenging

6. How likely are you to recommend this program to a friend or colleague? (Circle One)

Very Likely      Likely      Maybe      Not Likely      Definitely Won't

Why?

7. Think about the format, facilitation, length of time, or size of the group. What would suggest changing for next time?

8. Any other comments to help us improve in the future?