

Worksheet: Personalize Your Giving



People give for many reasons, all very personal to them.

Perhaps you feel strongly about a cause or an organization has touched your life or the lives of your loved ones. Maybe you want to create a legacy and set an example that inspires others to give. Or your giving is a way to bring your family together and pass along your values to future generations. The key to a rewarding giving experience is finding the best fit for you!

Follow the three steps below to develop a plan that meets your charitable priorities.

Step 1: Define Your Charitable Passions

- What issues do you care about? When you think about our world and society, what inspires or excites you? What upsets or angers you?
- If you could wave a magic wand and make a difference in the world, what would you change? How would the world be different?
- Why do you give? What gives you the greatest satisfaction when you give?
- What organizations do you currently give to? Why do you support these charities?
- Do you prefer to fund capital projects (bricks & mortar, equipment), emergency funding, endowment, general operating support, project support or something else?

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Step 2: Plan the Details of Your Gift

- What dollar amount or percentage of your estate do you want to leave charity?
 - What is your tax situation?
 - What assets are you interested in giving? The foundation can accept a wide variety of assets, including cash, life insurance, stock, property and more.
 - Are there any major life events coming up that could impact your giving decisions? (i.e. sale of a business, retirement, death of a loved one)
 - How much involvement do you want to have with the causes you support?
 - How much recognition would you like to receive?
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Step 3: Implement Your Plan to Create Impact!

Now that you've considered your charitable passions and details of your giving, it's time to put your plan in place!

- **First:** Call the community foundation. We'll walk through your charitable interests and set up a giving option that best achieves your charitable goals!
- **Next:** Contact your professional advisor. They'll help you decide what and when to give based on what's best for your financial situation. Then, we'll all work together to ensure your wishes are properly documented.
- **Finally:** Celebrate the impact your gift will have now and in the future!

Call us to learn more about making a permanent gift to the Heartland Community Foundation!

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