

# CREATE A CHARITABLE PLAN



As you're considering your annual goals for the year ahead, you've probably already thought about where you want to go with your giving. You may want to do big things with your generosity or a mix of things. But have you sat down and created an intentional plan? While spontaneous giving has its place, so does strategic planning. We encourage you to carve out some time to reflect on generosity. What will your generosity mean for you, your family, or your business? Here are some questions that can help you craft your philanthropic plan.

## MISSION STATEMENT

### Considerations

- ***What is the purpose of your wealth?***
- ***Why do you want to give to charity?***
- ***How do you want to be remembered?***
- ***What impact do you hope to achieve with your giving legacy now or after you have passed away?***

Response

## GIVING GOALS

### Considerations

- ***What social issues, charities, or areas of charitable interest do you want to support?***
- ***Is there a specific program, initiative, or cause you want to help fund? Or a mix of programs?***
- ***What is your timeframe?***
- ***Do you want your heirs to continue your giving legacy? If so, how?***
- ***How and when will you communicate with them about your intentions?***
- ***How important are taxes vs. charitable goals?***
- ***Philanthropy can be about your time, talents, and treasure. What does that look like for you?***
- ***How do you want to experience your philanthropy?***

Response

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## FINANCIAL RESOURCES, INVESTMENTS & OPTIONS

### Considerations

- *What financial resources will you use?*
- *What are the tax and legal implications associated with those various resources?*
- *What investment options are appropriate?*
- *What is your investment timeline?*
- *What additional giving tools (direct giving, charitable trust, private foundation, etc.) might you want to use?*
- *Which financial advisors or other professionals should be involved in creating and maintaining your plan?*

Response

## IMPLEMENTATION

### Considerations

- *What are the specific steps required to set up your plan?*
- *The Heartland Community Foundation is a charitable resource to help you implement your plan, what questions do you have for us?*

Response

## ONGOING PLAN REVIEW AND MEASUREMENT

### Considerations

- *How will you monitor commitment to your mission over time?*
- *How will you measure success?*
- *When and how often will you review your plan and consider making changes to it?*

Response

The Heartland Community Foundation can help you realize your charitable goals for intentional giving now or in the future with an estate plan. Ask us how we can help! Contact [heartland@gscf.org](mailto:heartland@gscf.org) or 785-621-4090 to schedule a visit. We are committed to helping improve our community and inspire philanthropy.