A GUIDE FOR COUPLES: OUR GIVING BLUEPRINT

<u>Instructions:</u> Use this worksheet as a guide to discuss and align your charitable goals as a couple. Take time to reflect on what matters most to you, rank your priorities, and identify the causes you want to support together. Happy Giving!

DEFINE SHARED VALUES	Her Response
What values do we want our giving to reflect? Examples may include:	His Response

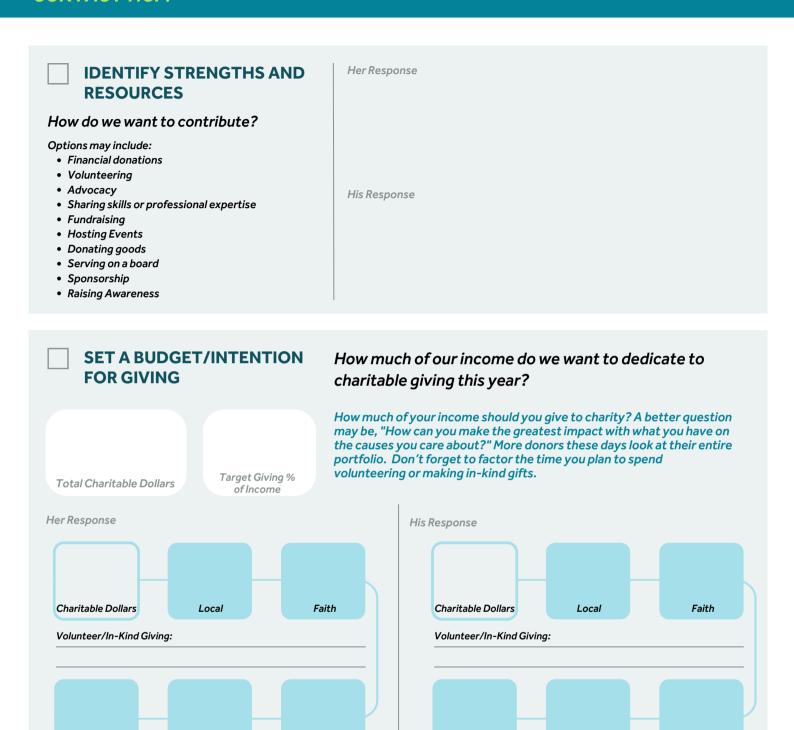
WHAT MATTERS MOST? Place a checkmark next to the categories that matter most to you: Or add your own ideas! Rank them 1-5, if you need to shorten your list. Responses Her His 1. Animal Welfare: Supporting shelters, rescue organizations, or wildlife conservation. 2. Arts: Funding museums, theaters, music programs, community art projects, or arts education. 3. Children: Supporting programs for child welfare, education, health, mentoring programs or youth leadership. 4. Civic Engagement: Supporting voter education, access to voting, and civic participation. 5. Community Enhancement: Supporting projects that improve local spaces and services. Cultural Preservation: Supporting programs, events that celebrate and preserve local heritage and traditions. 7. Disaster Relief: Providing aid for communities affected by natural disasters. 8. Education: Funding schools, childcare, literacy, higher education, libraries, or sponsoring scholarships. 9. <u>Elder Care</u>: Supporting programs that assist seniors with health, housing, food, or social opportunities. Environment: Funding conservation efforts, renewable energy, or community green areas. 11. Health and Wellness: Supporting hospitals, medical research, wellness training, or mental health initiatives. 12. Hunger: Donating to food banks, meal providers, food growers, gaps in school meals, or help with cooking. 13. <u>Housing and Homelessness</u>: Funding shelters, housing, or providing resources for low-income families. 14. Immigrant Support: Providing resources for resettlement, language learning, and job training. 15. Intellectual and Developmental Disabilities: Supporting services, programs, public access, and job training. 16. Mental Health: Promoting mental health services, awareness campaigns, counseling, and support groups. 17. Parks and Recreation: Funding new parks, park renovations, or supporting youth sports programs. 18. Politics: Donating to political candidates, PACs, or advocacy groups that align with your legislative priorities 19. Public Infrastructure: Contributing to projects like sidewalks, lighting, or community safety efforts. 20. Public Safety: Donating to police, first responder support, fire safety, or crime prevention initiatives. 21. Religion & Faith: Donating to churches, mission work, or spiritual education. 22. Small Business and Entrepreneurship: Investing in businesses, youth entrepreneurs, or microloan programs. 23. Social Justice: Advancing racial equity, inclusion, advocacy, and other social causes. 24. Substance Abuse Recovery: Supporting addiction treatment, prevention programs, and recovery services. 25. Technology Access: Bridging the digital divide, advancing STEM, promoting internet access programs. 26. Transportation Access: Improving public transit options or services for underserved populations. 27. <u>Veteran and Military Support</u>: Helping veterans and active-duty service members with resources. 28. Workforce training and development: Supporting jobs, workforce development, placement. career readiness. 29. Youth Justice and Prevention: Funding juvenile justice reform or resources for at-risk youth.

30. Other:

Seasonal/

Spontaneous

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Pause and reflect on your varying answers to create a family or household budget/intention for giving:

National

Other



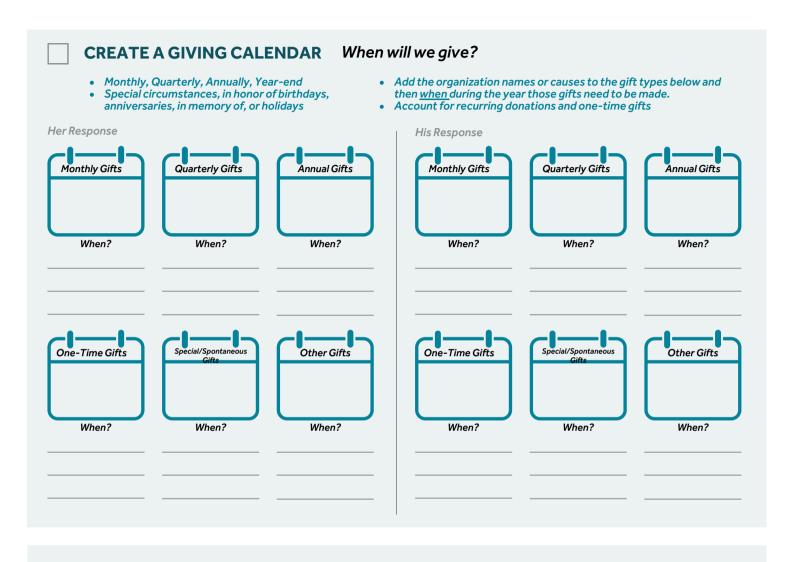
Seasonal/

Spontaneous

Other

National

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EXPLORE LONG-TERM GIVING GOALS

What is our legacy?

Do we want to:

- Establish an endowment? Or contribute to an endowment?
- Include charitable gifts in our estate plan?
- Finish our estate plan?
- Start a donor-advised fund?
- Create a family giving tradition?
- Talk to Mom and Dad about their legacy?
- · Something else?

Her Response

His Response

Next steps in 2025 toward these legacy goals:

- 1.
- 2.
- 3.

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REFLECT AND DECIDE TOGETHER				
Organization Name	Donation type	Amount	When?	Reason for giving to this organization

^{**}Print additional copies of page 4, if you need more lines for planned charitable giving!

GIVE BACK WITH GREATER IMPACT, CONTACT HCF!

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COMMUNICATION COMMITMENT	Her Response
How will we stay on the same page?	
 Schedule annual reviews of our giving strategy. Share any new causes we discover with each other. Celebrate our impact together! Communication allows for flexibility and responsiveness for special giving. 	His Response

REFLECTING ON OUR IMPACT How will we evaluate the impact of our giving?

Take time to review your charitable contributions and involvement over the year. Celebrate the ways you've made a difference and think about any adjustments you'd like to make to your giving plan.

Questions to consider:

- What positive changes have we seen from the organizations or causes we supported?
- Did we achieve our giving goals for the year? Why or why not?
- Are there new causes or projects we'd like to explore in the future?
- How has giving together brought us closer as a couple?

Ideas for reflection activities:

- Keep a "giving journal" to document your contributions and experiences.
- Schedule a year-end "giving review date night" to revisit your plan and discuss updates for the coming year.
- Write a letter to each other about why giving matters to you and share it as a keepsake or tradition.
- Make a Gratitude Jar: Throughout the year, drop notes into a jar about moments or causes that made you feel proud of your giving. Review them together at year-end.



INCLUDE KIDS IN A FAMILY GIVING PLAN

12 Ways to Include Kids in a Family Giving Plan

1 START WITH THEIR INTERESTS

- Ask kids what they care about most (e.g., animals, the environment, helping other kids).
- Help them to research charities or causes related to their passions.

2 SET ASIDE FUNDS FOR THEIR GIVING

- Give kids a portion of the family giving budget to decide where to donate.
- Introduce a "give jar" as part of an allowance system (spend, save, give).

VOLUNTEER TOGETHER

- Choose family-friendly volunteering opportunities like serving meals, cleaning up parks, or helping at animal shelters.
- Let kids take on age-appropriate tasks during volunteer activities.

4 CREATE A FAMILY GIVING TRADITION

- Involve kids in selecting a charity or project during the holidays, on birthdays, or at the start of the school year.
- Host an annual "family giving night" to review and choose where to give.

USE EVERYDAY OPPORTUNITIES TO GIVE

- Donate gently used clothes, toys, or books and let kids help decide where they go.
- Bake treats or create care packages for neighbors, first responders, or those in need.

TEACH THROUGH HANDS-ON PROJECTS

- Host a lemonade stand, bake sale, or craft fair and let kids donate the proceeds to a cause.
- Create cards or artwork to accompany donations to shelters, hospitals, or senior centers.

7 INCLUDE PHILANTHROPY INTO LEARNING

- Share stories of inspiring philanthropists or community leaders.
- Read books about giving and kindness (e.g., <u>The Giving Tree</u> or <u>Those Shoes</u>).

8 VISIT AND LEARN ABOUT CHARITIES

- Take kids on a tour of local nonprofits to see how donations are used.
- Encourage them to ask questions and meet the people they are helping.

9 CELEBRATE ACTS OF KINDNESS

- Keep a family kindness journal to track giving activities and reflect on their impact.
- Recognize and celebrate kids' contributions to family giving decisions.

ENCOURAGE CREATIVITY IN GIVING

- Let kids brainstorm unique ways to give back, such as hosting a toy drive or planting a garden to donate produce.
- Support their ideas with resources and guidance.

PARTICIPATE IN COMMUNITY EVENTS

- Attend fundraising events, charity walks, or donation drives as a family.
- Let kids take an active role, such as registering participants or handing out flyers.

SET AN EXAMPLE

- Share your own giving decisions and why you chose specific causes.
- Let kids see you actively giving your time, money, and resources.

