



**IDENTIFY STRENGTHS AND RESOURCES**

**How do we want to contribute?**

Options may include:

- Financial donations
- Volunteering
- Advocacy
- Sharing skills or professional expertise
- Fundraising
- Hosting Events
- Donating goods
- Serving on a board
- Sponsorship
- Raising Awareness

Her Response

His Response

**SET A BUDGET/INTENTION FOR GIVING**

**How much of our income do we want to dedicate to charitable giving this year?**

Total Charitable Dollars

Target Giving % of Income

*How much of your income should you give to charity? A better question may be, "How can you make the greatest impact with what you have on the causes you care about?" More donors these days look at their entire portfolio. Don't forget to factor the time you plan to spend volunteering or making in-kind gifts.*

Her Response

His Response

Charitable Dollars

Local

Faith

Volunteer/In-Kind Giving:

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Seasonal/Spontaneous

Other

National

Charitable Dollars

Local

Faith

Volunteer/In-Kind Giving:

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Seasonal/Spontaneous

Other

National

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

Local

Faith

National

Other

Seasonal/Spontaneous

**CREATE A GIVING CALENDAR** *When will we give?*

- Monthly, Quarterly, Annually, Year-end
- Special circumstances, in honor of birthdays, anniversaries, in memory of, or holidays
- Add the organization names or causes to the gift types below and then when during the year those gifts need to be made.
- Account for recurring donations and one-time gifts

*Her Response*

<b>Monthly Gifts</b>	<b>Quarterly Gifts</b>	<b>Annual Gifts</b>
When?	When?	When?
_____	_____	_____
_____	_____	_____
_____	_____	_____

*His Response*

<b>Monthly Gifts</b>	<b>Quarterly Gifts</b>	<b>Annual Gifts</b>
When?	When?	When?
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>One-Time Gifts</b>	<b>Special/Spontaneous Gifts</b>	<b>Other Gifts</b>
When?	When?	When?
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>One-Time Gifts</b>	<b>Special/Spontaneous Gifts</b>	<b>Other Gifts</b>
When?	When?	When?
_____	_____	_____
_____	_____	_____
_____	_____	_____

**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.



## **COMMUNICATION COMMITMENT**

### *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.*

*Her Response*

*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.*

## 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).

### 3 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.

### 5 USE EVERYDAY OPPORTUNITIES TO GIVE

- BACK:
- 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.

### 6 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., [The Giving Tree](#) or [Those Shoes](#)).

### 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.

### 10 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.

### 11 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.

### 12 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.