Inspired Philanthropy, Your Step By Step Guide to Creating A Giving Plan and Leaving a Legacy

CONTENTS

CD-ROM Contents ix

Foreword to the Second Edition: The Power of Doing Good: Giving to a Worthy

Cause Is Worth More Than You Know xiii

Preface xv

Acknowledgments xxiii

The Authors xxv Introduction 1

QuickStart Guide: Ten Steps to More Inspired Philanthropy 13

PART ONE Creating Your Giving Plan

- 1 Giving and the Nonprofit World 19
- 2 You, the Philanthropist 31
- 3 Developing Your System of Giving 45
- 4 Creating a Mission Statement 63
- **5** Deciding How Much to Give 73
- 6 Where to Give 87
- 7 Creating a Personal Giving Plan 105
- 8 The Many Ways to Give 137
- 9 Organizational Giving: Family Foundations and Corporate Giving 163

PART Two Strategic and Creative Ways to Leverage Your Giving

- 10 Engagement with Groups You Support 185
- 11 Creating Greater Plans for Your Family, Heirs, and Humanity 211
- 12 Growing and Partnering with the Next Generation of Givers 237
- 13 For Donors Who Have Much More to Give 253
- 14 The Power of Partnership: Transformative Philanthropy 267

Notes 289 Index 295

CD-ROM CONTENTS

EXERCISES

- 2.1 Stereotypes
- 2.2 Gratitude
- 2.3 Vision and Values
- 2.4 Indicators of Your Values
- 2.5 Making Choices
- 2.6 Time, Talents, and Treasures
- 3.1 Review of Your Recent Giving
- 3.2 Characteristics of the Groups You Support
- 3.3 Reflections

- 3.4 Thinking About Change
- 3.5 Imagining a Better World
- 3.6 Million-Dollar Visioning
- 3.7 Steps for Building a Comprehensive Giving Strategy
- 4.1 Writing Your Mission Statement
- 4.2 Mission Matching
- 5.1 How Much Money Do You Really Have?
- 5.2 How Much Should You Give?
- 5.3 How Much Will You Give During Your Lifetime?
- 6.1 Your Funding Areas
- 7.1 Your Giving Plan
- 8.1. Giving Methods
- 10.1 Level of Engagement
- 11.1 Checklist for Assessing an Advisor
- 11.2 Becoming a Legacy Partner
- 11.3 Who You Are Planning For?
- 11.4 Your Nonprofit Heirs
- 11.5 Current Wills, Legal Documents, and Titling of Assets
- 11.6 How Advisors Can Help
- 12.1 Mentoring
- 13.1 Giving from Assets

WORKSHEETS

- 6.1 Evaluating a Group for Possible Funding
- 7.1 Your Giving Plan
- 7.2 Multi-year Giving Record
- 7.3 Giving Intention
- 7.4 Results and Impact
- 7.5 How You Did as a Donor
- 10.1 Inspired Philanthropists' Checklist
- 10.2 Preparing for Site Visits

APPENDICES

Appendix A: Working with Advisors

Appendix B: Partnering with Clients for Inspired Outcomes: Notes to Advisors

and Nonprofits, by Phil Cubeta

Appendix C: Creative Ideas for Giving

Appendix D: Celebrity Philanthropy

Appendix E: Sample Letters

Appendix F: Breaking Barriers to Effective Giving

Appendix G: Loans to Friends

Appendix H: Comparison of Giving Options

Appendix I: Resources