Inspired Philanthropy:
Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy
www.inspiredphilanthropy.com

Exercise 8.1

Giving Methods

5–10 minutes

	I have used this method	I want information on this method	Not applicable to me or not interested
Financial Gifts			
Written a check	☐	☐	☐
Given cash	☐	☐	☐
Donated by credit card	☐	☐	☐
Given stock	☐	☐	☐
Given real estate or other holdings	☐	☐	☐
Setup charitable estate planning	☐	☐	☐
Designated insurance policies or IRAs to a nonprofit beneficiary	☐	☐	☐
Other: _____	☐	☐	☐
Non-Financial Gifts			
Given house or space for fundraising events, activists' or artists' retreats, or issues briefings	☐	☐	☐
Written a letter or placed a phone call of recommendation (leverage)	☐	☐	☐
Given equipment	☐	☐	☐
Given skills	☐	☐	☐
Other: _____	☐	☐	☐
Decision Making			
By self	☐	☐	☐
With partner	☐	☐	☐
With family (all ages)	☐	☐	☐
With groups of other people from similar incomes	☐	☐	☐
With mixed-income group	☐	☐	☐
With group of co-workers or friends	☐	☐	☐
Gave decision-making power to group of professionals in the field, or representatives of constituency groups or activists	☐	☐	☐

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Giving Methods, Cont'd

	I have used this method	I want information on this method	Not applicable to me or not interested
Gave decision-making power to a staff member, program advisor	☐	☐	☐
Gave decision-making power to someone else to decide	☐	☐	☐
Other: _____	☐	☐	☐
Mechanism			
Public community foundation or federation	☐	☐	☐
Donor-advised fund	☐	☐	☐
Donor circle	☐	☐	☐
Giving circle	☐	☐	☐
Online donation	☐	☐	☐
Venture philanthropic fund			
Loan to a nonprofit or individual	☐	☐	☐
Investment in a community loan or micro-enterprise fund	☐	☐	☐
As part of a mixed group of low-income and wealthy activists	☐	☐	☐
Workplace or payroll deduction	☐	☐	☐
Family foundation	☐	☐	☐
Supporting foundation	☐	☐	☐
Other: _____	☐	☐	☐
Designation of Donations			
Operating expenses	☐	☐	☐
Capital expenses (such as for building or equipment)	☐	☐	☐
Grantmaking funds	☐	☐	☐
Leadership sabbaticals	☐	☐	☐
Endowment gifts	☐	☐	☐
Matching or challenge gifts	☐	☐	☐
Technical assistance	☐	☐	☐
Scholarships	☐	☐	☐
Designation of Donations	☐	☐	☐

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Giving Methods, Cont'd

	I have used this method	I want information on this method	Not applicable to me or not interested
Loans	☐	☐	☐
Existing debt reduction	☐	☐	☐
Time frame			
One-year gift	☐	☐	☐
Multiyear gift	☐	☐	☐
Gift with no amount of time attached	☐	☐	☐
Planned gift (during lifetime or upon death)	☐	☐	☐

Reflection:

1. What is your analysis of your methods of giving?

2. What methods do you want to learn more about?

3. What information do you need and who or what resource can best answer your questions?

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