

Gift Planning/Philanthropy

If you had unlimited wealth would you give to charity? ☐ Yes ☐ No

On average, how much do you donate to charity each year?

Which charities or institutions get the bulk of your donations?

What makes these charities or institutions important to you?

Would you like these charities to derive greater benefit from your donations?

Would you increase your gifts if you could do so without reducing your net after-tax income?

What role has philanthropy played in your family?

What role would you like it to play?

What value would you like it to have for your children?

What was the most satisfying charitable gift you have made and why?

How do you see your wealth in relation to your community and society?

What are the major challenges facing your community?

Could any of these be a focus for your giving?

What would you like to accomplish through your giving?

What core values would you like to express through charitable giving?

What do you want to be remembered for?

Is there a favorite cause to which you would like to see a bequest made from your estate? If yes, please provide details.

If yes, how are these assets to be handled by the estate?

Do you own any real estate or vacation properties aside from your principal residence? ☐ Yes ☐ No

Where are they located?

What are your plans with these holdings?

Do you currently have any individually owned life insurance?

Actual copies of contracts will help with important details and to address any misunderstandings about coverage amounts and specifics. What are the details of coverage (if copies of actual contracts are not available)?

Advisor notes, comments and recommendations