Strategic Giving Questionnaire

1. What are you most passionate about in life? Check as many as apply.

___ Arts & Culture
___ Children’s Issues
___ Economic Justice (fighting poverty, hunger, homelessness, etc.)
___ Education
___ Science & Technology
___ Other: ____________________________________________

2. How have your passions been influenced or fostered by members of your family? Which passions are shared by others in your family?

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3. Are there issues facing society that you would like to see your personal or family giving have a hand in solving? If so, please describe.

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4. What values do you hope that your personal or family giving will reflect?

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5. What is the most satisfying charitable gift you have ever made? Describe why this felt satisfying.

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6. Is there a geographical area or a particular organization that you feel your giving should focus on? If so, identify and describe your interest in this geographical area or organization.

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7. What involvement, if any, would you like your children / nieces and nephews / grandchildren to have in your giving?

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8. How will you assess the impact of your giving on the causes, places, or people you care about?

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