YOUR INFAITH GIVING PLAN
Set Your Course Well
SPREADING JOY. CHANGING LIVES.

The things we hold dear—our faith, values and life experiences—are what motivate our giving. It is through giving that we have the chance to act upon the values and causes close to our heart.

The desire to do this well is the reason a thoughtful giving plan is so important. A plan allows you and generations to come to do this work with purpose and vision—and help achieve the change you want to see. It also provides InFaith Community Foundation with the insight needed to work on your behalf.

Through this plan you also have an opportunity to tell the story of what is central to what you believe and influence the arc of the world around us.

HOW TO START
To begin, set aside time to give this process your full attention. This booklet will prompt you to focus and clarify your giving plans, and will help you articulate your beliefs and desires.

You may find it helpful to go through this process with your family or others who are involved with your plan for giving. Alternatively, InFaith staff can assist you with this process and help tailor a giving plan incorporating your values and interests.

Step 1 Your Giving Goals: Questions to Jumpstart Your Giving (pages 3 - 4)
Step 2 Reflecting on Your Journey (page 5)
Step 3 Articulating Your Mission (page 6)
Step 4 Acting on Your Mission (page 7)
Step 5 Sharing Your Charitable Goals (page 8)
Step 6 How InFaith Can Help (page 9)
Step 7 Evaluation & Your Next Steps (page 10)

The questions on the following pages are designed to guide your process for creating a focused giving plan. InFaith staff can help you with this process and tailor a giving plan to your values and interests.

Your Name(s): ______________________________________________________ Date: ________________
Your Donor Advised Fund Name: ____________________________________________________________

CONTACT US

At InFaith Community Foundation, we’re here to serve you and your giving interests. To learn more, contact:

inFaithFound.org 625 FOURTH AVENUE SOUTH, SUITE 1500, MINNEAPOLIS, MN 55415
p 800.365.4172 f 612.844.4109
YOUR GIVING GOALS: QUESTIONS TO JUMPSTART YOUR GIVING

These questions are from InFaith’s one-page worksheet titled “Your Giving Goals: Questions to Jumpstart Your Giving.”

Think of this worksheet as a starting point, a scratchpad for approaching your giving through InFaith Community Foundation. If you wish, invite family and friends in the discussion. Once completed, please send a copy to InFaith for your donor advised fund documents, so we can better understand your giving goals and ensure your intentions are met. For a more in-depth tool to explore your giving interests, contact InFaith for a copy of Set Your Course Well: Your InFaith Giving Plan.

REASONS YOU GIVE. Imagine you’re telling your friends or family why you give — what would you share with them?
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

ABOUT THE NEEDS AROUND US. What current local, national or global issues and needs concern you the most?
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

ABOUT YOUR PASSIONS. What are you passionate about?
What makes your heart soar?
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

YOUR GUIDING VALUES. What values are important to you? Which do you want expressed through your giving?
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__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

DREAM FOR TOMORROW. If you could change one thing about what the world looks like in the future, what would it be?
__________________________________________________________________
__________________________________________________________________
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__________________________________________________________________

YOUR FAITH. How does your faith influence your giving?
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__________________________________________________________________
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(continued, over)
YOUR GIVING GOALS: QUESTIONS TO JUMPSTART YOUR GIVING
continued

WHERE THE GOOD WORK HAPPENS. Think of an organization you admire. What do you like about what they do? ____________________________________________________
____________________________________________________________
____________________________________________________________
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GETTING SPECIFIC. How do you want your benefiting charity(ies) to use your gift? Do you want to support general operating expenses, address a specific need or target a geographical area?
____________________________________________________________
____________________________________________________________
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THE BIG PICTURE. Look at the answers you provided on this worksheet. What patterns do you see? What do your answers tell you about your motivation and focus for giving? ____________________________________________________
____________________________________________________________
____________________________________________________________

The questions on this page and the previous (pages 3 & 4) are pulled from InFaith’s one-page worksheet titled “Your Giving Goals: An Easy Way to Get Started.” Should you wish to have a copy of this document, please visit inFaithFound.org/generationsgive, or call 800-365-4172.
REFLECTING ON YOUR JOURNEY

Some people find it easier to identify causes, interests or issues from a list. What of the following do you care about supporting through your giving most? Check all that apply.

<table>
<thead>
<tr>
<th>Faith-based Programs &amp; Ministries</th>
<th>Health Issues &amp; Services</th>
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</thead>
<tbody>
<tr>
<td>My church</td>
<td>Hospitals</td>
</tr>
<tr>
<td>Church body support</td>
<td>Medical research</td>
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<tr>
<td>Ecumenical efforts</td>
<td>Alcohol/substance abuse</td>
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<td>Global ministries</td>
<td>Health and spirituality</td>
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<td>Multicultural ministries</td>
<td>Specific diseases (please describe):</td>
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<td>Children and youth ministries</td>
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<td>Senior ministries</td>
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<td>Prison ministries</td>
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<td>Campus ministries</td>
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<td>Maritime/Armed services ministries</td>
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<tr>
<td>Outdoor ministries (camps, etc.)</td>
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<tr>
<td>Media ministries (TV, radio, websites, etc.)</td>
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<tr>
<td>Faith-based nursing homes/long-term care facilities</td>
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<tr>
<td>Parish nurse programs</td>
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<td>Bible translation</td>
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<tr>
<td>Church administration</td>
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<tr>
<td>Pastoral continuing education</td>
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<tr>
<td>Lay ministry/lay leadership</td>
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<tr>
<td>Worship</td>
<td></td>
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<tr>
<td>Building/facilities/capital preservation</td>
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<table>
<thead>
<tr>
<th>Education</th>
<th>Social Issues &amp; Services</th>
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<tbody>
<tr>
<td>Preschools</td>
<td>Crime prevention</td>
</tr>
<tr>
<td>K-12 schools</td>
<td>Domestic violence/child abuse</td>
</tr>
<tr>
<td>Colleges and universities</td>
<td>Legal services/legal aid</td>
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<tr>
<td>Seminaries</td>
<td>Economically disadvantaged populations</td>
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<tr>
<td>Scholarship support</td>
<td>Employment/jobs</td>
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<tr>
<td>Extension/adult learning</td>
<td>Food/nutrition/hunger</td>
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<td></td>
<td>Immigrants/refugee services</td>
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<td></td>
<td>Homelessness/housing</td>
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<td></td>
<td>Child care/early development</td>
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<td>Seniors/elderly</td>
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<td></td>
<td>Persons with disabilities</td>
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<td>Other human services (please describe):</td>
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<tr>
<th>Environmental Issues</th>
<th>Arts, Culture &amp; Humanities</th>
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<tr>
<td>Pollution/global warming</td>
<td>Libraries</td>
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<tr>
<td>Natural resources/conservation</td>
<td>Museums</td>
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<tr>
<td>Animal protection/endangered species</td>
<td>Historic preservation</td>
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<td>Zoos/aquariums</td>
<td>Music</td>
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<td>Theater</td>
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<td>Dance</td>
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<td></td>
<td>Arts education</td>
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<td>TV, radio, film</td>
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<th>Other</th>
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ARTICULATING YOUR MISSION

A mission or purpose statement can help focus a giving plan, as well as communicate your charitable vision. Using your answers to the questions from previous pages, write a short statement of your giving mission. You may need to write several of these statements, depending on the breadth of your giving. You may wish to try the following format; alter the organization of the sentence as you see fit:

To achieve my/our charitable goals of ______________________________ we wish to give to ______________________________ who believe ______________________________ and work to change lives for ______________________________.

Example: To achieve our charitable goals of care for those with depression and bipolar disorder, we will give to organizations that provide care and transition services for this population. The organizations we wish to support will believe that those with these disorders have a vital place in society, and work to change the lives for the many who suffer from mental illness.

Example: To achieve my charitable goal of spreading joy, I will give to educational institutions that foster church music, keeping this music vibrant and alive.

YOUR GIVING MISSION

____________________________________________________________________________________________
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____________________________________________________________________________________________
____________________________________________________________________________________________
____________________________________________________________________________________________
ACTING ON YOUR MISSION

Consider how you want your donor advised fund to operate. The nuts and bolts of your giving plan will help ensure you achieve your charitable goals.

1. If you have more than one organization or cause you’d like to support, share the percentage of your giving:

<table>
<thead>
<tr>
<th>ORGANIZATIONS YOU’D WISH TO SUPPORT</th>
<th>PERCENT OF YOUR GIVING</th>
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2. Are you interested in providing funding for a charity’s general operating expenses?
   □ Yes  □ No

3. Are you interested in providing capital support (such as building construction or renovations)?
   □ Yes  □ No

4. Are you interested in providing support for specific projects or programs of a charity or nonprofit?
   □ Yes  □ No

5. Where do you wish to give?
   □ Locally  □ Nationally  □ Globally

6. Are you interested in providing:
   □ Ongoing support to charities
   □ Making one-time gifts to charities

7. Your giving would be best described as:
   □ One major grant each year
   □ A few larger grants each year
   □ Several smaller grants each year
   □ A combination of large and small grants

8. What information do you need to help you decide which organizations/projects to support?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
SHARING YOUR CHARITABLE GOALS

Besides providing InFaith Community Foundation with information about your charitable goals, there are likely others who you will want to inform about your wishes, including family members, children, grandchildren and friends. Sharing your giving plan allows others to help you live out your desires and fosters a broader awareness for giving.

1. Make a list of people who should know about your giving plans.

____________________________________________________________________________________________
____________________________________________________________________________________________
____________________________________________________________________________________________

2. Do you want them involved in the decision making? If so, how?

____________________________________________________________________________________________
____________________________________________________________________________________________
____________________________________________________________________________________________

3. If others are involved in the decision making, how will you get their input into the process? (We strongly encourage personal meetings, although letters, email exchanges or phone conversations may also work for you.)

____________________________________________________________________________________________
____________________________________________________________________________________________
____________________________________________________________________________________________
WE’RE HERE TO SERVE YOU

InFaith Community Foundation’s donor services department is here to help make the most of your giving plans. Contact us for help to:

• Recommend new grants from your fund, check the status of a grant request, or request that a grant be expedited;
• Create or refine your giving goals;
• Update your Fund Agreement with new beneficiaries, advisors or contingencies;
• Research charities that match your charitable goals and values;
• Follow-up with charities on how grant support was used;
• Discuss unique grantmaking scenarios (i.e., international grants),
• Schedule a personal visit or phone review of your charitable fund; or,
• Connect you to a gift planner to make additional gifts to your fund.

Contact us at 800-365-4172 or email contact@inFaithFound.org.

LEARN MORE ABOUT CHARITIES

Charity Navigator - CharityNavigator.org
Charity Navigator is America’s leading evaluator of charities. Their rating system examines two broad areas of a charity’s financial health - how responsibly it functions day-to-day and how well positioned it is to sustain its programs over time. Each charity is then awarded an overall rating of zero to four stars.

GuideStar - GuideStar.org
With free registration you can view information on all 1.8 million nonprofits listed with GuideStar, and all are formally registered with the IRS or have proven they meet all IRS criteria for exempt organizations.

Charities Review Council: SmartGivers.org
Visit this website to take a closer look at charities before making your important social investment.
LOOPING BACK ON YOUR GOOD THINKING

Your preferences for giving will likely evolve over time. We encourage you to set a time to revisit this document and contact us to make sure your giving remains aligned with your charitable goals. It’s a great time to determine whether your goals are still relevant and to examine the patterns and impact of your giving. Put a reminder on your calendar today for a day three-to-five years from now.

THANK YOU FOR DOING THIS IMPORTANT WORK

Through this document, you have articulated your values and wishes for your charitable giving. Your responses to questions also provide InFaith with valuable insight so we can assist you with your giving. Once you have completed this booklet, please send it to InFaith:

InFaith Community Foundation
625 Fourth Avenue South, Suite 1500
Minneapolis, Minnesota 55415

Phone: 800-365-4172
Fax: 612-844-4109
InFaithFound.org

InFaith will return the original booklet to you and keep a copy on file as record of your giving intentions.
VISION
Throughout our community and by God’s grace, we will achieve effective, positive and lasting change.

MISSION
To serve our donors with integrity as together we change lives and spread joy by sharing our blessings with the world.

VALUES
As a Christian organization, our work reflects our service, stewardship, collaboration, possibilities and results.

WE OFFER
• Donor advised funds, giving circles, collaborative funds and organizational endowments
• Full range of giving options, from simple to complex
• Flexibility to give to any charity
• Maximum tax benefits based on when and how you give
• Donor-centered services including online access and family giving resources
• Mission-based investments for charitable assets