

## **CHARITABLE FACT FINDER** *a tool for Financial Advisors and their clients*

Based on responses to the questions below, InFaith Community Foundation can help you create a charitable giving plan that matches your client's giving needs and interests. For more information, please call the Foundation at 800.365.4172.

### **Starting the Conversation**

- ✓ Have you considered giving to charity – either while living or upon death?
  - If yes, are you satisfied with what you give? Would you like to give more?
  - If no, would you consider leaving dollars to charity if it would not hurt you or your family financially? What if it could help you or your family financially?
- ✓ Would you like to continue giving to charities after death?
- ✓ Would you be interested in creating a giving plan that has a lasting impact (either during your life or after death)?

### **Exploring Ways to Give**

- ✓ What types of charitable giving are currently part of your giving program?
- ✓ Are any charities named in your will?
- ✓ Do you have any life insurance, annuities, or IRAs that could be given to charity as beneficiary proceeds – all or a portion?
- ✓ Do you have any appreciated assets (securities or real estate) that you resist selling because of capital gains taxes?
- ✓ Do you have assets set aside that you would like to give in exchange for ongoing income payments?
- ✓ Would you be interested in making a future substantial gift to charity through smaller, annual gifts that are tax deductible?
- ✓ How do you want your estate to be shared among family, church/charities and the government? Is there a set amount or upper limit that you want to leave your family?

### **Determining Charitable Interests**

- ✓ Do you actively volunteer with any organizations?
- ✓ What organizations/institutions have provided the greatest influences in your life? (e.g. church, school/college, community)
- ✓ Do you have favorite charities? What about them appeals to you the most?
- ✓ Would your financial support to any organization/charity be missed if it ceased?
- ✓ What entities would you be most interested in helping? Are there societal issues you wish to address?

**Fine-tuning the Donor's Charitable Plan**

- ✓ Do you want a giving plan that provides for a charity during your lifetime and/or at your death?
- ✓ Do you want the charity(ies) to receive a lump sum upon your death or do you want to provide ongoing support?
- ✓ Do you want to give anonymously or by name? In memory or in honor of someone?
- ✓ Do you want to support multiple charities?
- ✓ Do you want to give to a certain program or target a specific geographic area?
- ✓ Do you want the flexibility to select different charities over time?
- ✓ Do you want to involve your family in your charitable giving plans?