

Joseph Caccippio Financial Advisor

Planning Discussion Guide: Charitable Planning

- Define your values and reasons for giving. What causes are most important to you and why?
- What are the organizations have you supported in the past and do you intend to support in the future?
- How and when do you make your donations to help minimize taxes?
- What process do you have in place to evaluate the impact of your gifts. How can you monitor the communications and reports from each organization to see if they are meeting your expectations?

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