

of Wells Fargo Advisors

Planning Checklist: Charitable Planning

approach helps you give back with more impact	
	Define your values and reasons for giving. What causes are most important to you and why?
	Create or refine your mission or goal statement to help guide your giving decisions so you stay on point
	Research the best ways to address each area of need. Do research to help identify the organizations that fit your mission and support your identified causes
	Decide how and when you'll make your donations to help reduce taxes
	Evaluate the impact of your gifts. Decide how you can monitor the communications and reports from each organization to see if they are meeting your expectations
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