

Planning Checklist: Charitable Planning

Five steps to more strategic, effective philanthropic giving. A deliberate, organized 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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