

# BENEFACTION

## Simple Giving Plan Template



Adapted from the Bolder Giving Workbook. [BolderGiving.org](http://BolderGiving.org)

Why not take a half an hour to draft a giving plan today? It will help you say “no” with confidence to requests that don’t fit your priorities, and thus say “yes” with clarity to the right opportunities. Chances are, you’ll feel more effective as a giver and enjoy your giving more.

### Time period

What is the time frame for your giving plan? Within your lifetime? Within the next 5 years? After you are gone?

### Vision statement

I want to make a difference in....

This is where you define the strategy behind your gift. At the core, what do you want your gifts to achieve?

### How much will I give?

Money:

Time:

Talents (include which ones):

I determine how much to give by...

This could be a percentage of income or assets. You could consider gifting some or all of the capital gains from your investment portfolio. Alternatively, you could choose to treat your non-profit as “another child” or aim to give the amount necessary to significantly reduce your tax burden or give over time based on your surplus capital figure (see the worksheet Calculate your lifetime giving).

### To what cause will I give?

Include your overall areas of focus and other considerations like geography, relationships

1

2

3

### How will I give?

By what process will I give? Who else is involved? When will you give? Through which charitable vehicles? Other.