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EPLI PHILANTHROPY PLANNER
INVOLVING FAMILY SUMMARY

INSTRUCTIONS
List the individuals that you would like to involve in your philanthropy.

<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • •
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INSTRUCTIONS
For each name you have listed above, consider what role you want them to have. Also think about their strengths and any concerns you have with involving this person in your philanthropy.

<i>Example</i>	
NAME Martha	ROLE(S) Thought Partner
<p>STRENGTHS How would this person help me meet my philanthropic goals?</p> <p><i>Knows organizations in the local community. Shares my values and interests.</i></p>	<p>CONCERNS Why might you hesitate to involve this person?</p> <p><i>May be busy with other projects.</i></p>
<p>List the topics you would like to discuss with this person:</p> <p><i>Recommendations for education organizations.</i></p>	<p>Action steps to move forward:</p> <p><i>Will ask next lunch.</i></p>

FAMILY MEMBER 1	
NAME	ROLE(S)
<p style="text-align: center;">STRENGTHS</p> <p>How would this person help me meet my philanthropic goals?</p>	<p style="text-align: center;">CONCERNS</p> <p>Why might you hesitate to involve this person?</p>
List the topics you would like to discuss with this person:	Action steps to move forward:

FAMILY MEMBER 2	
NAME	ROLE(S)
<p style="text-align: center;">STRENGTHS</p> <p>How would this person help me meet my philanthropic goals?</p>	<p style="text-align: center;">CONCERNS</p> <p>Why might you hesitate to involve this person?</p>
List the topics you would like to discuss with this person:	Action steps to move forward:

FAMILY MEMBER 3	
NAME	ROLE(S)
<p>STRENGTHS</p> <p>How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS</p> <p>Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>

FAMILY MEMBER 4	
NAME	ROLE(S)
<p>STRENGTHS</p> <p>How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS</p> <p>Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>

FAMILY MEMBER 5	
NAME	ROLE(S)
STRENGTHS How would this person help me meet my philanthropic goals?	CONCERNS Why might you hesitate to involve this person?
List the topics you would like to discuss with this person:	Action steps to move forward:

FAMILY MEMBER 6	
NAME	ROLE(S)
STRENGTHS How would this person help me meet my philanthropic goals?	CONCERNS Why might you hesitate to involve this person?
List the topics you would like to discuss with this person:	Action steps to move forward: