

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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K

ACTIVITY

SET YOUR TOTAL PHILANTHROPY BUDGET

INSTRUCTIONS

Review the questions in Activity K either on your own or with the support of your advisor, and jot down your thoughts. You do not have to answer all the questions.



WORKSHEET

SET YOUR TOTAL PHILANTHROPY BUDGET

INSTRUCTIONS

Reflect on the total philanthropy budget written down in the Section 1: Finding Your Focus Areas Section Summary, or identify a new desired total budget. Review the questions below, either on your own or with the support of your advisor, and jot down your thoughts. You do not have to answer every question.

How much do you wish to allocate to your philanthropy in the next year? Over the next three years? The next five to seven years? The next decade or more?

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What future financial situations or developments could affect how much you allocate to your philanthropy?

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What are the potential tax considerations for your different time horizons?

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Given your current financial circumstances, could you think about allocating more?

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WORKSHEET
SET YOUR TOTAL PHILANTHROPY BUDGET

Are you in a position to consider giving appreciated assets as part of your philanthropy?

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How have you thought about allocating assets for the next generation?

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Would you like to revisit your allocations in the future? If so, when?

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How much are you setting aside as your total philanthropy budget?