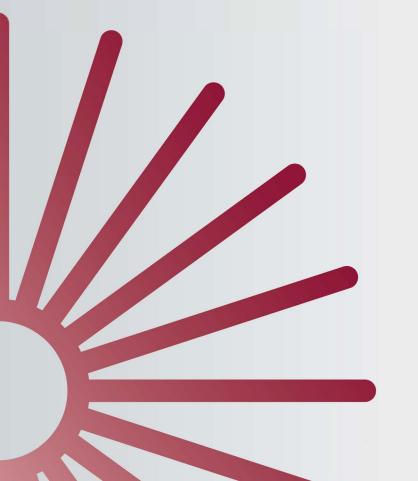
# PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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#### 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?
What future financial situations or developments could affect how much you allocate to your philanthropy?
What are the potential tax considerations for your different time horizons?
Given your current financial circumstances, could you think about allocating more?



# WORKSHEET SET YOUR TOTAL PHILANTHROPY BUDGET

Are you in a position to consider giving apprect philanthropy?	iated assets as part of your
How have you thought about allocating assets f	or the next generation?
Would you like to revisit your allocations in the	
How much are you setting aside as your total philanthropy budget?	