



## Charitable Giving Questionnaire #1

1. Which of the following are most important to you? (Please rank them from 1 to 5, with 1 as the highest and 5 as the lowest value.)

Personal achievement	_____	Personal incentive and hard work	_____
Career success	_____	Self-esteem	_____
Financial independence	_____	Service to others	_____
Family unity and tradition	_____	Permanent legacy	_____
Responsible uses of money	_____	Philanthropy	_____
Creativity	_____	Volunteerism	_____
Faith/Spirituality	_____	Other	_____
Community standing	_____		

2. If you had to pick five words or phrases from the list below that express your value, which would they be? (Feel free to add any that are missing or especially meaningful to you)

Acceptance	_____	Honored Obligations	_____
Access	_____	Innovation	_____
Accountability	_____	Independence	_____
Beauty	_____	Integrity	_____
Commitment	_____	Interdependency	_____
Communication	_____	Joy	_____
Community	_____	Justice	_____
Compassion	_____	Knowledge	_____
Courage	_____	Leadership	_____
Creativity	_____	Love	_____
Democracy	_____	Opportunity	_____
Dignity	_____	Peace	_____
Diversity	_____	Preservation	_____
Empathy	_____	Respect	_____
Equality	_____	Responsibility	_____
Excellence	_____	Service	_____
Faith	_____	Simplicity	_____
Family	_____	Stability	_____
Freedom	_____	Transformation	_____
Fulfillment	_____	_____	_____
Generosity	_____	_____	_____
Harmony	_____	_____	_____
Healing	_____	_____	_____
Honesty	_____	_____	_____



3. Who or what were the greatest influences on you in developing your values?

Parents	_____	Mentors	_____
Other relatives	_____	Organizations	_____
Teachers/Coaches	_____	Other	_____
Personal experiences	_____		

4. How did your family achieve its present financial status?

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5. Please describe your parents' financial histories.

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6. Which financial values and/or decisions of your parents continue to affect you most today?

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7. How much money do you need to spend each year to live comfortably?

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8. Which important values do your children already possess?

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How will these values be transmitted to your grandchildren?

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9. How wealthy do you want your children (and grandchildren) to become?

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Why?

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Age	Capital	Income
20s	_____	_____
30s	_____	_____
40s	_____	_____

10. What are the pros and cons of leaving substantial wealth to your children?

Benefits \_\_\_\_\_  
Risks \_\_\_\_\_

11. How much do they know about the inheritance they will receive?

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12. How confident are you that your children have the judgment and skills to manage and to use inherited wealth?

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13. How philanthropic do you expect your children to be?

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14. Do you feel any personal responsibilities beyond your family?

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15. What part does philanthropy play in your own value system?

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16. Which institutions have been most important to you in your life?

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17. There are three basic beneficiaries of your estate: your heirs, the IRS, and the institutions and causes that matter to you.

What is the current percentage distribution?

Heirs \_\_\_\_%                      IRS \_\_\_\_%                      Philanthropy \_\_\_\_%

What would you like it to be?

Heirs \_\_\_\_%                      IRS \_\_\_\_%                      Philanthropy \_\_\_\_%

18. Are you aware of some techniques that can be used to modify these percentages to more closely resemble your goals?

Yes \_\_\_\_\_

No \_\_\_\_\_