

DEFINING YOUR PHILANTHROPIC LEGACY



legacy (noun) /'legesē/: the lasting impact of a person's life

What Drives You?

To help you take control of your legacy, this guide is designed to help you focus your giving on what matters most to you. By clarifying your values and goals, you're empowered to shape your philanthropic legacy.

Your Legacy in Action

Your legacy is the mark you leave on the world—the sum of your values, your impact, and how others will remember you. It's not just about financial resources but also the principles guiding you. This worksheet will help you define your personal giving mission statement and create an actionable plan to turn your vision into reality.

GETTING STARTED:

CRAFTING YOUR PERSONAL MISSION STATEMENT

Documenting your intentions for giving provides clarity for you and your loved ones. Writing down and sharing your values is the first step toward building a philanthropic legacy you control. Whether you're using a donor-advised fund (DAF) or other ways of giving, having a personal mission statement helps empower you to direct your impact now and for future generations.

Your mission statement can be as detailed or simple as you'd like, but consider including:

- Your values and what drives your passion for giving.
- Areas of interest, whether specific causes or organizations.
- Time horizons—are you thinking short- or long-term?
- People involved, including family members or other advisors.

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Reflecting on What Inspires You

Your life experiences, values, and motivations shape your giving. Before crafting your mission statement, take a moment of reflection. Answering these questions can help define what drives you, making your giving more impactful and aligned with your personal vision.

What formative experiences or challenges shaped you?

How do they influence your decisions?

Who has been an influential figure in your life, and what did they teach you about giving?

What are your core values? What do you stand for, and why?

What motivates you to give, and what impact do you hope to make?

Setting a Focus for Your Giving

Your mission statement should outline the impact you want to make. Consider the following as you develop your focus:

What causes are you most passionate about, and why?

Who do you want to help? Is there a specific population or community?



Where do you want to make an impact—locally, nationally, or globally?

What's your long-term vision? How will your giving evolve over time?

Write Your Mission Statement

Now, craft a one-to-three sentence statement capturing your values and vision.

Example:

"In memory of my father who was a pediatrician, I will support causes which help increase access to healthcare for children in underserved communities in the city I live in, so future generations have better opportunities."

CREATING YOUR ACTION PLAN

Now that your mission statement is clearly defined, the next step is turning your goals into action. Here are ways to develop a strategy that works for you.

Learn More

Explore areas where you want to make a difference:

- Create a list of nonprofits and research their work.
- Learn about effective approaches in your interest area.
- Attend relevant events or conferences.
- Set up online news alerts to stay informed about your focus area.

Decide How You Want to Help

Giving isn't just about money—it's about the full breadth of your talents and resources. Consider how else you can contribute:

- Offer your skills or expertise to organizations.
- Volunteer your time or commit to specific causes monthly.
- Serve on a board or participate in a leadership role within an organization.

Allocate Your Financial Resources

Plan your financial contributions with intentionality:

- Create a giving budget on a monthly or annual basis.
- Discuss your giving goals with family or a financial advisor.
- Explore advanced strategies, such as using long-term appreciated assets or establishing a donor-advised fund (DAF) as part of your legacy.

Commit to Your Plan

Empower yourself by setting clear priorities.

Choose one to three goals you will act on this year:

This year, I will:

1. _____
2. _____
3. _____

For short-term focus, identify one to three steps you'll complete in the next three months:

Within three months, I will:

1. _____
2. _____
3. _____

Use this plan to take ownership of your giving, revisit it regularly, and adjust your approach as you move forward. Building a legacy takes time, but every step helps you make meaningful progress toward the future you envision.

This worksheet empowers you to not only define your philanthropic goals but to actively create and own a legacy that reflects your values and aspirations. By focusing your giving, you set the course for long-term impact which resonates with your life's mission