



COULD YOU BENEFIT FROM AN ADVISOR?

Whether you are an experienced philanthropist or just beginning to consider philanthropic investment, it is important to create an investment strategy for your philanthropic capital. If you are a primary decision maker for your personal or family philanthropy, consider the following questions:

Planning

- Does your family have a written philanthropic master plan?
- How was it developed and who participated in that process?
- Does it balance your family legacy of philanthropy with new and innovative philanthropy options?
- Do your philanthropic investments compliment your business or personal goals?
- Does your philanthropic vision align with your family's values?
- Are you anticipating a generational transition and how will you prepare and educate the next generation?
- Do you feel overwhelmed by the number of solicitations you receive?
- Do you have a policy for responding to solicitations from friends and family members?

Implementation

- Is your family currently working with a community foundation or through a donor advised fund?
- Do your current advisors offer a full range of philanthropic and tax planning services?
- Is your family office a part of your philanthropic team?

Independent Review

- Are you evaluating the range of potential grantees in the areas you are interested in supporting?
- Are your grantees meeting the terms of your gifts and grants?
- Are you satisfied with their performance and reporting on your gifts and grants?
- Do you have access to decision makers within the organizations you are supporting?
- Are you leveraging your philanthropic impact by working with other families to tackle large projects?
- What metrics are you using to analyze the impact of your grantees?

Reporting

- Do you have a system in place to track all of your gifts and pledge balances?
- Does your family foundation investment mix reflect your personal values?
- Are you working with your advisors to ensure that your gifts and grants are tax efficient?