Professional Advisors:

How to Talk to Your Clients About Charitable Giving

A few questions to ask your clients to help them accomplish their financial, charitable and lifetime goals:

1. Beyond family and business, what is most important to you?

2. Do you have important family values and philanthropic goals? Do you want to teach your children to give in the same manner you give?

3. What would you like your personal and/or family philanthropic legacy to be?

4. Who do you want to inherit your assets – Family? Government? Charity?

5. Do you wish to include charitable giving in your financial or estate plan?

6. Have you considered what would happen to your assets if your spouse or children do not survive you? Would you like any of your assets passed on to a charity?

7. To what charitable organizations do you currently contribute?

8. Are there time-sensitive tax considerations influencing your giving decisions?

9. Is reducing taxes a goal in your estate planning?

10. Are you interested in trying to make your money work better for you in your retirement while also providing for organizations that are important to you?

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