

QUESTIONS TO ASK CLIENTS INITIALLY

Who, What, Why, When, Where, and How (much)

Philanthropy is part of overall conversation about wealth, estate, and tax planning and it is a natural conversation about their goals. Clients will understand that advisors need to know their current and anticipated future role of charitable giving in order to provide the best possible advice. In the end, it is the clients' decision whether and how much to give, but it is the advisor's role to ascertain interest.

1. Are you actively involved with any non-profit organizations? In what capacity?
2. Do you intend to be more or less involved in the future? As a board member, volunteer or donor?
3. How do you decide which organizations to support?
4. Do you typically support the same organizations every year?
5. Do you give the same amount every year? Upon what does it depend? Do you anticipate that the amount will change at some point in your life?
6. When do you typically make your donations? Throughout the year or at one time?
7. Who makes the decisions about where and how much to give?
8. Do you turn to anyone outside of your family for input or advice on which organizations or causes to support?
9. Do you feel that you currently could benefit from outside input?
10. Are there certain geographic areas that have been very important to you in your life?
11. Which past donations that have given greatest satisfaction?
12. Are there any donations you've regretted?
13. Do you prefer to give during your lifetime or after death?
14. If after death, for a limited time-frame or forever?
15. Is a charitable legacy important to you?
16. In your estate plan, have you named any charities to which you will leave money? Set amount, percentage or other?
17. Who will be involved later, perhaps after death? Children? Advisors? Community Foundation?
18. Do you prefer to give anonymously or publicly?
19. Do you prefer to give to large or small organizations?
20. Are you interested in supporting many or few organizations?
21. What assets have you used for charitable giving in the past, and do you anticipate any change in the future?
Are you aware that you can use assets other than cash and publicly traded stock?
22. Do you have any charitable vehicles already in place? Any desire to change? Any issues with those you have?
23. (If business owner), does company have foundation or giving program?
24. Is anything holding you back from giving now? (Enough for children, your own long life, concerns about health and expenses, financial uncertainty?)
25. How much effort do you want to put into your charitable giving? Conduct site visits? Attend conferences?
Collaborate with other donors?