



GIVING INTEREST INVENTORY

As a philanthropist, giving opportunities abound. Maybe you already know the groups and organizations you wish to help. If not, Legacy's Giving Interest Inventory will assist you in identifying your philanthropic priorities and passions.

STEP 1 – What Causes are Closest to Your Heart and Speak Directly to Your Values and Goals?

Through personal experience, most of us have specific charitable causes we can relate to. Check TWO general areas that you feel particularly strong about helping:

- | | |
|--|--|
| <input type="checkbox"/> Religion/faith | <input type="checkbox"/> Domestic or international policy |
| <input type="checkbox"/> Poverty | <input type="checkbox"/> Environment |
| <input type="checkbox"/> Education | <input type="checkbox"/> Natural disaster preparation/response |
| <input type="checkbox"/> Health | <input type="checkbox"/> Civil society/cultural issues |
| <input type="checkbox"/> Human rights | <input type="checkbox"/> Economic development |
| <input type="checkbox"/> Child development or youth issues | <input type="checkbox"/> Rural concerns |
| <input type="checkbox"/> Family issues | <input type="checkbox"/> Scientific or medical research |
| <input type="checkbox"/> Women and girls' issues | <input type="checkbox"/> Animal health/prevention of cruelty |
| <input type="checkbox"/> Men and boys' issues | <input type="checkbox"/> Community service/volunteerism |
| <input type="checkbox"/> Older adult (65+) issues | <input type="checkbox"/> Other (identify below) |
| <input type="checkbox"/> Amateur sports | _____ |
| <input type="checkbox"/> Visual or performing arts | _____ |
| <input type="checkbox"/> Violence in families, schools, or crime | |
| <input type="checkbox"/> Homeland security/terrorism | |
| <input type="checkbox"/> International security | |

STEP 2 – Who or What Do You Want to Help?

Read through the lists and check TWO groups related to the charitable causes you selected in Step 1 that you have a strong concern for and would like to support with your charitable giving.

- | | |
|--|--|
| <input type="checkbox"/> Infants and preschool children (ages birth-3) | <input type="checkbox"/> Physically challenged |
| <input type="checkbox"/> Children (ages 3-13) | <input type="checkbox"/> Cognitively challenged |
| <input type="checkbox"/> High school students (ages 14-18) | <input type="checkbox"/> Mentally ill |
| <input type="checkbox"/> College students/young adults (ages 19-23) | <input type="checkbox"/> Medical patients (cancer, AIDS, etc.) |
| <input type="checkbox"/> Parents | <input type="checkbox"/> Chemical and substance users |
| <input type="checkbox"/> Women (ages 24-64) | <input type="checkbox"/> Facilities/buildings |
| <input type="checkbox"/> Men (ages 24-64) | <input type="checkbox"/> People in other countries |
| <input type="checkbox"/> Seniors (ages 65 +) | <input type="checkbox"/> Wildlife/domestic pets |
| <input type="checkbox"/> The homeless | <input type="checkbox"/> Waterways/oceans |
| <input type="checkbox"/> Workers or the unemployed | <input type="checkbox"/> Land/Forests/Open spaces |
| <input type="checkbox"/> Minorities | <input type="checkbox"/> Earth's atmosphere |
| <input type="checkbox"/> Clergy | <input type="checkbox"/> Other (identify below) |
| <input type="checkbox"/> Teachers | _____ |
| <input type="checkbox"/> Military/police/fire/EMT personnel | _____ |
| <input type="checkbox"/> Amateur athletes | |
| <input type="checkbox"/> Musicians and other performing artists | |
| <input type="checkbox"/> Visual and literary artists | |
| <input type="checkbox"/> Immigrants | |

STEP 3 – What Specific Needs Do You Wish to Address?

Your selected groups in Step 2 will have specific charitable needs. Check TWO matters that you would like your charitable giving to address:

- | | |
|--|---|
| <input type="checkbox"/> Physical or emotional pain | <input type="checkbox"/> Personal empowerment to change |
| <input type="checkbox"/> Physical, emotional, sexual abuse | <input type="checkbox"/> Personal faith |
| <input type="checkbox"/> Public awareness of a specific issue | <input type="checkbox"/> Overcoming illness and disease |
| <input type="checkbox"/> Isolation/rejection | <input type="checkbox"/> Economic opportunities |
| <input type="checkbox"/> Life transition | <input type="checkbox"/> Habitat preservation/restoration |
| <input type="checkbox"/> Hunger | <input type="checkbox"/> Sustaining the environment |
| <input type="checkbox"/> Housing/shelter | <input type="checkbox"/> Other (identify below) |
| <input type="checkbox"/> Literacy | _____ |
| <input type="checkbox"/> Obtaining a higher level of education | _____ |
| <input type="checkbox"/> Special skills or job training | |
| <input type="checkbox"/> Life skills/independence training | |
| <input type="checkbox"/> Healthy relationships | |
| <input type="checkbox"/> Single parenting | |
| <input type="checkbox"/> Financial literacy | |

STEP 4 – You and Your Partner – The Non-Profit Organization

Most charitable work is carried out by a specific type of nonprofit organization. From the list below, check ONE that you envision yourself partnering with:

- | | |
|---|--|
| <input type="checkbox"/> Church or synagogue | <input type="checkbox"/> Public or private educational institution |
| <input type="checkbox"/> Faith-based ministry group outside of church | <input type="checkbox"/> Hospital or medical facility |
| <input type="checkbox"/> General nonprofit organization | <input type="checkbox"/> Government agency |
| | <input type="checkbox"/> Other (identify below) |
| | _____ |

STEP 5 – Organizational Orientation

Many social service organizations aim their work to reach a certain population. How or when do you think the problem you are addressing would be most effectively served? Choose ONE.

- Prevention Health/Recovery after
 Early intervention Multiple approaches
 Late intervention/rescue

STEP 6 – Organizational Nature

Like businesses, charitable organizations come in many different descriptions and sizes as well as stages of maturity. Check ONE nature of the organization you envision helping:

- Large and established Innovative and entrepreneurial
 Small and established Visionary organization in
start-up or growth phase
 Established but in decline,
needs assistance for turnaround Grassroots and loosely structured

STEP 7 – Area of Service

What realm of influence should your charitable focus have? Check ONE.

- International National Regional Statewide
 City/County Neighborhood Other (please identify) _____

STEP 8 – Creating your Personal Giving Mission Statement

Use your choices for Step 1-Step 7 to fill in the blanks below:

*I feel strongly about helping causes related to _____ and _____,
(items checked in step 1)*

*that specifically address the needs of _____ and _____,
(items checked in step 2)*

*who need help with _____ and _____.
(items checked in step 3)*

*I envision fulfilling my charitable goals with a _____ that is
(item checked in step 4)*

*_____ oriented, is _____ in nature,
(item checked in step 5) (item checked in step 6)*

and whose area of influence is _____ (item checked in step 7).