

Who Will Be Thankful for YOU this Thanksgiving?

Time to take a look at your giving in 2017

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Summer isn't even over, and yes, I'm already looking at the fall calendar. I just noticed that we have only 3 months – that's a single fiscal quarter – until we hit Thanksgiving. When we gather around the table with friends or family in late November, what's going to be on our minds? What will we be thankful for? For whom will we be thankful?

And what nonprofits or causes will be thankful for you as the end of the year approaches? 2017 has been quite the year for everyone – politicians, donors, nonprofits, communities, causes and more. It's been an overwhelming time for some and a galvanizing time for others. It's been challenging to stay on the sidelines this year, and many people took this as an opportunity to engage, to get involved, or to make a difference. Think about what you will have done in 2017 that will prompt a heartfelt "Thank you!"

Now might be a good time to pause and assess. What have the past few

months looked like for you? What's been your level of engagement in various causes, issues or organizations that are important to you?

Did you say to yourself in back January, "I'm going to do whatever I can to help address such-and-such issue!" What promises or commitments did you and your family make? What wrongs were you going to right? What injustices were you going to tackle? Were you ready to make a big impact on all kinds of causes?

How did you do? How close are you to achieving those goals?

Chances are – if you're like me – life got in the way. We never seem to be able to get as much done as we wish. Our well-considered plans remain less than fully realized. Or even if we did check everything off the list, new things keep popping up that should have been on that list in the

first place. There are always more issues that need to be confronted, more people who need help, and new societal challenges requiring our attention.

Review your giving so far in 2017. Do a simple analysis and give yourself a sense of where things stand. Ask yourself challenging questions about your philanthropy.

Here are a few suggestions:

- How many individual contributions did you make? Were they unrestricted gifts, restricted, event related, or a combination?
- What was the total number of nonprofits supported by your giving? Did you give a little to many groups, a lot to a few, or something in between?
- Were your gifts focused on a single cause or topic? Or did your support a diverse range of issues?
- What was the average size of your contributions? Did that vary by cause or type of organization?
- Did your giving touch different neighborhoods or communities? Did your gifts stay close to home or affect people far away?
- Were your financial contributions complemented by other gifts, such as referrals, connections, time, or expertise?



WHO WILL BE *Thankful for YOU?*

Example of a simple Giving Analysis and Actio Plan

What picture did that analysis paint? Are you happy with the results? Were there some surprises? Were you disappointed? Did you get inspired? Bear in mind that there is no single correct way for this to look. Use this review to assess how your giving lines up with your own personal expectations and ambitions.

There's still plenty of 2017 left to fulfill those promises you made back in January. There are many steps you can take to ensure your giving truly reflects your passion, your values and your capabilities. Sit down and have a conversation with your spouse, your partner, your family, or a financial or philanthropic advisor. Create a plan for the coming months.

Consider these and other moves you might make:

- If you've made many small gifts to a range of nonprofits, carefully select a few and make a second gift to them, increasing your impact.
- Make thoughtful, strategic gifts to address any gaps your analysis might have uncovered, such as a missed neighborhood, an overlooked organization or an emerging issue.
- If your financial situation limits additional contributions, explore ways you can leverage your personal, professional or social networks to advance causes that are important to you.

2017 is most definitely shaping up to be a memorable year. Right now is a great opportunity for you to take a moment and review your giving practices over the past several months. This is the time to make sure your philanthropy is as memorable as this year has been.



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Are you and your family ready to examine your giving in 2017? Are you interested in exploring the questions posed in this paper and create a philanthropic roadmap for the remainder of the year?

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Collaborations welcome with attorneys, wealth managers, accountants or other professional advisors.

