



Generosity Portfolio

In your generosity strategy session, the SignatureGENEROSITY team will co-create your Generosity Portfolio to realize your personalized giving plan.



PURPOSE STATEMENT

Your purpose statement clarifies who, what, where and how you will give. Based on your background and interests, here is your unique purpose statement:



PASSIONS

Based on your responses to our Generosity Alignment Quiz, these are the causes that most align with your heart:

- _____
- _____
- _____
- _____
- _____



RESOURCES

What do you have that you are willing to share? (Time, Skills/Knowledge, Network/Relationships, Finances)

- _____
- _____
- _____
- _____
- _____



GIVING GOALS

What percentage of your income or assets do you plan to give? Do you have specific volunteering goals?

- _____
- _____
- _____
- _____
- _____



VALUES

Based on your responses to our Core Values Assessment, these principles will guide your giving:

- _____
- _____
- _____
- _____
- _____



GENEROSITY PARTNERS

These are the organizations or causes that you have identified where you will consider focusing on generosity investments.

- _____
- _____
- _____
- _____
- _____

YEAR

CREATED FOR

Now that you have created a vision for your generosity journey, it is time to **plan your next steps** to work towards maximizing the impact of your giving.



HOW CAN YOUR SIGNATUREFD ADVISOR PARTNER WITH YOU TO PLAN YOUR GIVING?

- ☐ Open a donor-advised fund
- ☐ Create a budget for giving on a monthly or annual basis
- ☐ Help facilitate conversation around giving goals with family or spouse
- ☐ Incorporate charitable giving into your overall financial or legacy plan
- ☐ Other:



THESE ARE MY/OUR SPECIFIC GIVING GOALS:

ORGANIZATIONS	AMOUNT OF FINANCIAL SUPPORT	OTHER SUPPORT OR INVOLVEMENT



FAMILY ENGAGEMENT

How will you engage your children or other family members?



WITHIN THE NEXT SIX MONTHS I/WE WILL:



GIVING HIGHLIGHTS

Examples: Our family built a Habitat for Humanity home. I joined the Board of a local non profit.

GIVING OVERVIEW

CASH GIFTS	\$
GRANTS FROM DAF	\$
TOTAL GIFTS TO ORGANIZATIONS	\$
NUMBER OF ORGANIZATIONS	
AVERAGE GIFT SIZE	\$
CONTRIBUTIONS TO DAF	\$
CURRENT VALUE OF DAF	\$

TOP FIVE GENEROSITY RECIPIENTS

	NAME	AMOUNT	PURPOSE
1			
2			
3			
4			
5			



VOLUNTEER ENGAGEMENT

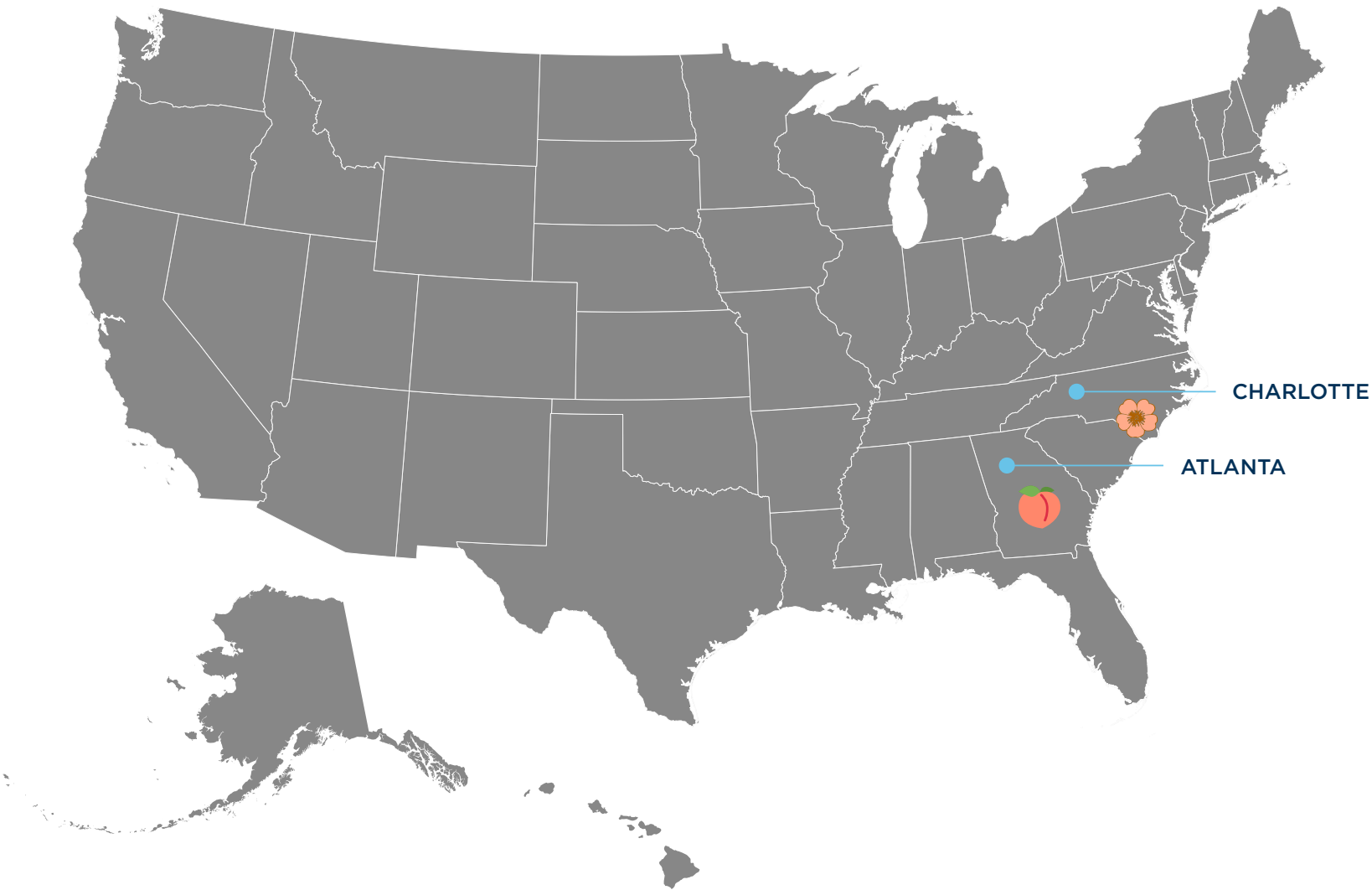


FAMILY ENGAGEMENT

YEAR

CREATED FOR

Your Year of Giving



Your Year of Giving

