



## Giving Plan Warm-Up — Show Me the Money!

### How Much Money Do You Really Have?

In order to get a true picture of your financial situation as it relates to the rest of the United States, check the salary range below that best describes your income:

\*Remember this is pretax income for last year, 2007.

My household pretax income last year was . . . (check one)\*

- |   |  |
|---|--|
| <input type="checkbox"/> less than \$25,000 (26.99 percent of the population) | <input type="checkbox"/> \$100,000 or more (12.60 percent of the population)   |
| <input type="checkbox"/> \$25,000–\$34,999 (11.39 percent of the population)  | <input type="checkbox"/> \$119,540 or more (6.63 percent of the population)  |
| <input type="checkbox"/> \$35,000–\$49,999 (14.87 percent of the population)  | <input type="checkbox"/> \$166,000 or more (5.00 percent of the population)  |
| <input type="checkbox"/> \$50,000–\$74,999 (18.39 percent of the population)  | <input type="checkbox"/> income in excess of \$500,000 annually and net worth of \$6.5 million (top 1 percent of the population) |
| <input type="checkbox"/> \$75,000–\$99,999 (11.13 percent of the population)  |  |

Now that you know this, list your “big ticket” budget items. In other words, what do you spend the majority of your income on?

- |   |  |
|---|--|
| <input type="checkbox"/> rent/mortgage        | <input type="checkbox"/> student loans |
| <input type="checkbox"/> transportation       | <input type="checkbox"/> other         |
| <input type="checkbox"/> credit card payments |  |

Name three things that you spend your money on that you would be willing to alter or eliminate to save money?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

If you implemented the two of the three cost savings measures listed above, do you feel you could be or would like to share more of your financial resources philanthropically?



## Individual Giving Plan

Year \_\_\_\_\_

What issues am I passionate about? Brainstorm in the box below.

### My Giving Mission Statement:

*\*Giving Mission Tip: Look above in the brainstorming box and review what you are passionate about and consider 2-3 of those issues.*

Ask yourself:

- What you want to help to improve or change?
- What timeframe do you want to set in order to make a difference with your financial giving?

Now, taking all of the information asked into consideration, draft a giving mission statement!

### Giving Mission Statement

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What percentage of my money/salary do I want to designate for my giving plan?

\_\_\_\_\_ 10%

\_\_\_\_\_ 20%

\_\_\_\_\_ 30%