

Individual Giving Plan

Year _____



What issues am I passionate about? Brainstorm 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 one or two things do you want to help to improve or change?
- What timeframe do you want to set in order to make a difference with your giving?

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

Giving Mission Statement:

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

5% 10% 15% 20% 25% 30%

Giving Plan Warm-Up

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.*

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

- | | |
|--|---|
| <input type="checkbox"/> less than \$25,000 (26.99% of the population) | <input type="checkbox"/> \$100,000 Or more (12.60% of the population) |
| <input type="checkbox"/> \$25,000-\$34,999 (11.39% of the population) | <input type="checkbox"/> \$119,540 Or more (6.63% of the population) |
| <input type="checkbox"/> \$35,000-\$49,999 (14.87% of the population) | <input type="checkbox"/> \$166,000 Or more (5.00% of the population) |
| <input type="checkbox"/> \$50,000-\$74,999 (18.39% of the population) | <input type="checkbox"/> income in excess of \$500,000 annually and net worth of \$6.5 million (top 1% of the population) |
| <input type="checkbox"/> \$75,000-\$99,999 (11.13% 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 two of the three cost savings measures listed above, do you feel you could or would like to share more of your financial resources philanthropically?

**Source. “Census Bureaus Annual Demographic Survey: 2004 Current Population Survey,” www.census.gov.*