



## **YOUR GIVING PLAN**

Making a difference through intentional giving.

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**RAYMOND JAMES**

When it comes to fulfilling your philanthropic aspirations, applying a strategic approach can make all the difference. It can help maximize your contributions, amplify your impact and strengthen your support for the causes that mean the most to you. That's why we created Your Giving Plan. Designed to organize and strategize your gifting, this plan consists of actionable steps to help you move forward while giving back.

**THE STEPS TO COMPLETE YOUR GIVING PLAN:**

1. Take the leap and get organized.
2. Determine the legacy you wish to leave behind.
3. Plan in line with your larger legacy.
4. Establish your giving priorities.
5. Work with trusted advisors to execute Your Giving Plan.
6. Enjoy your results.

**STEP 1: TAKE THE LEAP AND GET ORGANIZED.**

Using the values statement form in the appendix, write down the causes that mean the most to you and why.

Consider who you want to form part of your legacy.

**STEP 2: DETERMINE THE LEGACY YOU WISH TO LEAVE BEHIND.**

Clearly define how you want to make an impact.

Research and list organizations whose missions align with yours.

**STEP 3: PLAN IN LINE WITH YOUR LARGER LEGACY.**

Create a mission statement for your charitable legacy.

Outline the details and intention of your mission statement.

**STEP 4: ESTABLISH YOUR GIVING PRIORITIES.**

Use the form labeled “Delineate Your Giving Plan” in the appendix to list your giving in order of importance.

Provide instructions on when ranking changes can be made.

**STEP 5: WORK WITH TRUSTED ADVISORS TO EXECUTE YOUR GIVING PLAN.**

Interview and select an advisor to help you establish Your Giving Plan.

Set up your charitable giving vehicle and review its structure.

**STEP 6: ENJOY YOUR RESULTS.**

Celebrate the impact of your charitable legacy.

Share your successes.

# Appendix

## DELINEATE YOUR GIVING PLAN.

Use the form below to determine the organizations you wish to support and why.

Organization: \_\_\_\_\_

Intention (Why do you wish to support this cause?): \_\_\_\_\_

Charitable mission (What does the organization do and how does it fit your goals?):

Donation amount: \_\_\_\_\_ Donation frequency: \_\_\_\_\_

Organization: \_\_\_\_\_

Intention (Why do you wish to support this cause?): \_\_\_\_\_

Charitable mission (What does the organization do and how does it fit your goals?):

Donation amount: \_\_\_\_\_ Donation frequency: \_\_\_\_\_

Organization: \_\_\_\_\_

Intention (Why do you wish to support this cause?): \_\_\_\_\_

Charitable mission (What does the organization do and how does it fit your goals?):

Donation amount: \_\_\_\_\_ Donation frequency: \_\_\_\_\_

Organization: \_\_\_\_\_

Intention (Why do you wish to support this cause?): \_\_\_\_\_

Charitable mission (What does the organization do and how does it fit your goals?):

Donation amount: \_\_\_\_\_ Donation frequency: \_\_\_\_\_

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**CREATE YOUR VALUES STATEMENT.**

Answer these questions to define your philanthropic goals and establish a road map for Your Giving Plan.

What motivates you to give?

What are your interests? Why?

Where do you spend most of your time? What about your money?

Which life events have shaped your worldview?

What philanthropic values have your family passed on to you?

Additional notes:

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**LIFE WELL PLANNED.**

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**RAYMOND JAMES®**

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