



## Ideas for Creating a Family Giving Plan

Do you and your family want to make a positive impact in the world?

Your family can create a plan for charitable giving to help fund nonprofits that support causes you care about. Philanthropy can also bring families together and serve as a beneficial tax strategy.

So how do you build an effective giving plan? Here are a few ways to get started.

- 1. Identify causes that matter to the family.** The world is full of worthy causes. Focusing on shared goals around what matters most to your family will make more of an impact than smaller, scattered donations.
- 2. Determine where to give.** Once you know what matters most, you and your family will need to decide how to give. Do you want to focus on small, local charities, or do you want to give to larger, international organizations?
- 3. Consider your tax goals.** Writing a check can be the go-to giving strategy, but it isn't the only way. You can maximize the tax benefits of charitable giving through different methods. For example, your family can gift appreciated securities to save on capital gains taxes. You can also leverage a donor-advised fund program to take advantage of immediate tax deductions. Families also have the option to create a private foundation to manage charitable donations, which could lead to more tax savings.
- 4. Work as a team.** Family giving is a team effort. Identify different roles for different people and regularly communicate about the mission of the giving plan. Even younger members of the family can get involved to learn about financial literacy.

Charitable giving can become an integral part of a family's financial planning. Reach out if you have questions about making the most of your donations while realizing tax efficiencies.

*The highest Compliment you can give your ROI Financial Advisor is to refer them to someone special like yourself. We thank you for your business & most recent consideration.*



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