

Your Philanthropic Mission Statement

Step 1:

Let's create your personal **Philanthropic Mission Statement** to help you stay focused and strategic in your giving.



FAMILY BACKGROUND AND VALUES

What are some of the lessons you have learned from friends and family about money and philanthropy? How have these lessons impacted your approach to giving today?

Growing up, what people in your community did you think needed the most assistance? How did you, your family or your community come to their aid?

PROFESSIONAL & PERSONAL DEVELOPMENT

What are some of your unique talents, gifts and skills?

What schools, institutions or relationships have had a significant impact on you?

What personal or professional opportunities in your life do you feel most grateful for?

How have certain challenges or setbacks influenced or changed your perspective on things?

Are there any particular books, experiences or current events that have inspired you to give back?

PERSPECTIVES ON WEALTH

What are your greatest joys that arise from having access to financial resources?

What qualities or circumstances do you believe account for your or your family's success in accumulating wealth?

What is your biggest hope as it relates to money? What is your biggest fear?

YOUR LEGACY

Describe the causes that you care most about. What are your reasons for supporting these organizations?

Imagine your 80th birthday celebration. What would you like a dear friend or family member to say about you in their toast?

YOUR APPROACH

What charitable areas are you most passionate about (e.g., education, healthcare, poverty alleviation, environmental issues?)

Do you want to focus on a particular geography?

How much and how often do you want to give?

Step 2:

Review your responses to the questions. Do you notice any recurring patterns? Are there any themes that stand out? Circle or highlight these patterns and themes.

Step 3:

Use your responses to help craft a single-sentence mission statement that highlights the cause(s) you want to focus on and how you hope to use the resources at your disposal to make an impact.

Here are some examples to provide inspiration:

“My mission is to substantially reduce the number of dogs and cats that are euthanized in my city by supporting the most efficient no-kill adoption centers and promoting spay and neuter programs.”

“My mission is to make a difference in the health and well-being of others and to stop child obesity by sharing my personal experiences and knowledge about living with diabetes.”

“My mission is to improve the lives of disadvantaged children by opening doors of opportunity through mentoring and education.”

My Philanthropic Mission Statement:

Step 4:

Now that you have your own mission statement, use it as a reference point whenever you’re faced with a decision on how to best allocate your time, talent or treasure. Your philanthropic mission statement not only helps clarify the impact you want to have, but can also make it easier to say “no” to causes that do not directly advance your personal philanthropic goals.

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