



National  
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Trust

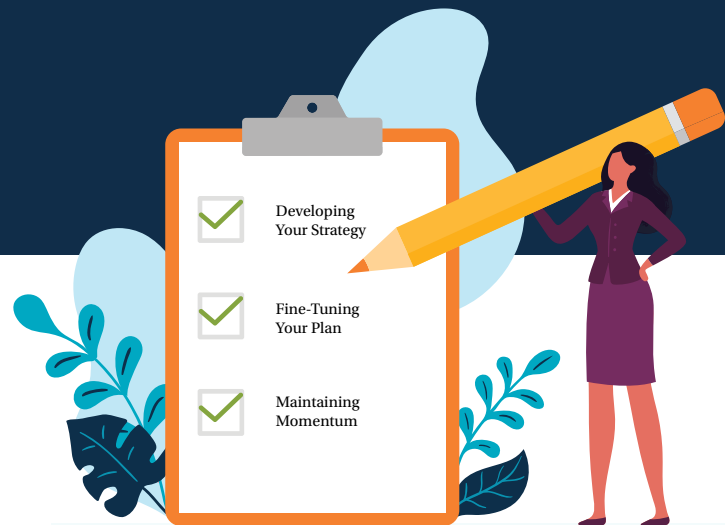
# Defining Your Philanthropic Strategy: A Checklist

**GIVING SEASON IS A GREAT TIME OF YEAR** not just to respond to fundraising requests, but also to engage in long-range thinking about what you want your giving to accomplish.

This checklist will help you consider how to adjust your tactics in order to give more efficiently and effectively. We recommend using this resource as a guideline for a conversation with your financial advisor.

Visit [nptrust.org/philanthropic-strategy](https://nptrust.org/philanthropic-strategy) to find additional resources for strategic ways to give. There you'll find workbooks created by Stanford University's Center for Philanthropy and Civil Society to help you articulate your philanthropic strategy, narrow your charitable focus and figure out the best ways to support your favorite mission-driven organizations.

If you already have an NPT DAF, you can also log in to GivingPoint to find an expanded philanthropic toolkit on the Guidance page.



## DEVELOPING YOUR STRATEGY

- Who else, if anyone, should be included in planning your strategy?
- Are there any charitable goals you already know you want to pursue?
- What is your preferred timeframe for giving?
- Do you plan to make all your gifts while living, or would you like to set your giving up so that it extends beyond your lifetime?

## FINE-TUNING YOUR PLAN

- What is your estimated annual giving budget?
- How will you segment your giving to support the issues you care about while also considering new requests from friends and family, or responding to emergencies?
- Are there specific types of assets you plan on giving?
- What is the best investment plan to achieve your budgetary and giving goals?

## MAINTAINING MOMENTUM

- How would you like to track and assess your charitable impact?
- Are there organizations you would like to support regularly with multi-year, recurring gifts?
- How frequently would you like to check in on the progress of your giving strategy?
- If you have had any recent changes in your family structure or charitable involvement, have you updated your Legacy Plan to ensure your donor-advised fund (DAF) continues to support those values?