

## Philanthropy Questions To Get Started

As a financial planner, you may find an increasing number of your clients asking your advice about how to organise their charitable affairs. Philanthropy is fast becoming an accepted part of wealth management. Current research indicates clients appreciate their financial planners being aware of trends in philanthropy, and their ability to guide them to trusted experts and resources even if they do not expect them to have in-depth knowledge of the technicalities of giving.

Community foundations are one of the resources you can use to support your client relationship, when your client has an interest in giving locally.

If you're new to having a philanthropy conversation, here are some suggestions of questions to get started. Of course it helps if you know your client well and have built up trust with them over a number of years. It also helps if you are willing to share some of your own experiences of giving.

### Explorative questions

- Beyond family and business, what is important to you? Are there some issues that you are passionate about, or is there one that you find most frustrating?
- If you could change one, two or three things in your community, what would they be?
- What principles have guided how you have lived your life? Raised your family? Run your business? What does your faith or cultural background encourage you to do?

### Planning questions

- Do you currently volunteer or financially support any charitable organisations, and of these which gives you the most satisfaction and pride? Why? Would you like to consider continuing your support to them through your financial plan?
- Have you ever thought about what kind of personal legacy you want to leave?
- Have you considered what would happen to your assets if your spouse or children do not survive you? Would you like any of your assets passed on to a charity, rather than to a distant relative?
- Is there an organisation or issue that you would like to learn more about? Would you welcome opportunities to meet others with similar charitable interests in your area?
- Who is involved in helping you think about your giving? How important is their input?

*Community Foundations are there to support you  
and your clients with philanthropy*