



Your Gift. Your Way. Your Community

A guide to personalizing your philanthropic impact

Many people come to a point in their lives where they want to give back. They do so for a number of reasons, many very personal. What motivates you? Perhaps you feel strongly about a cause. Perhaps an organization has touched your life or the lives of loved ones. Maybe you want to create a legacy that inspires others to give.

For as many motivations there are to give, there are many ways of giving. The key to having a rewarding giving experience is finding the best fit - for your charitable priorities, financial goals, and personal passions. This guide is designed to spark purposeful conversations between you, your loved ones and your professional advisors to share your charitable desires.

What are your charitable priorities?

Charitable Interests - You may have a single charitable interest, an important cause or organization or you may have several. Perhaps you have a desire to support community needs as they arise. Note the charitable interests that you'd like to pursue.

- | | |
|---|--|
| <input type="checkbox"/> Greatest Need or opportunity | <input type="checkbox"/> Human Services |
| <input type="checkbox"/> Community Betterment | <input type="checkbox"/> Specific charity or charities |
| <input type="checkbox"/> Education | <input type="checkbox"/> Church |
| <input type="checkbox"/> Health | <input type="checkbox"/> Other _____ |

Impact - What impact do you want to make with your charitable giving?

- Solve specific, current, critical needs or opportunities
- Provide ongoing support for specific nonprofit organizations
- Help address critical unmet needs in the community
- Address long-term, systemic social issues
- Support and improve the quality of life in the community
- Other _____

Knowledge - Would you like more information in the following areas?

- Evaluating charitable giving options
- Understanding community needs and opportunities
- Establishing a fund through the San Angelo Area Foundation
- Receiving income from a charitable gift
- Establishing a philanthropic plan

Personal - What other considerations have you made?

- Have you provided for your loved ones?
- Have you shared your charitable desires with professional advisors?
- Do you desire to honor or memorialize a loved one?

Involvement - Do you wish to be active in making grant recommendations?

The key to having a rewarding giving experience is finding the best fit for your charitable priorities, financial goals, and personal preferences.



San Angelo Area Foundation
221 S. Irving St.
San Angelo, TX 76903
325-947-7071
saafound.org

Assets and Taxes - Most large gifts present the opportunity for significant and immediate tax deductions. Some people choose to make an impact during high-income years to maximize their tax deductions. You may wish to donate appreciated securities or real estate to minimize taxes on the sale of these assets. Charitable bequests can play a role in estate planning for your heirs.

- | | |
|---|---|
| <input type="checkbox"/> Cash | <input type="checkbox"/> Closely held stock and business assets |
| <input type="checkbox"/> Appreciated Securities | <input type="checkbox"/> Real Estate |
| <input type="checkbox"/> Oil or Mineral Rights | <input type="checkbox"/> Life Insurance |
| <input type="checkbox"/> Retirement Savings | <input type="checkbox"/> Other Assets: _____ |

Transitions - Major life events often drive changes to an estate plan and prompt impactful gifts. Which of the following transitions might be relevant?

- Selling a business
- Change in marital status for you and your heirs
- Retirement or estate planning
- Receiving an inheritance
- Birth or coming of age of children or grandchildren
- Death of a loved one

Timing - Maybe you would like to start giving now, so you can be involved or potentially see the impact of your gift. Or perhaps you'd like to give through your estate. Many donors choose a combination of these. What is your giving vision?

- Would like to give during my lifetime to see the impact of my gift
- Would like to give during my lifetime and also create a legacy with a planned gift
- Would like to defer giving - creating a legacy with a planned gift

Recognition - Some people like a level of recognition for their good work. It attracts attention to their cause, generates awareness, and may inspire others to give. Some prefer anonymity. What level of recognition do you prefer?

- Lasting recognition (name on a fund)
- Public recognition (name in public announcement or media coverage)
- Simple recognition (personal thank you and name listed in annual report or newsletter)
- Anonymity



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