Developing A Thoughtful Plan for Philanthropic Giving

When to Give – and When to Say "No"

- Each year, decide how much you want to give away annually
- Develop a list of institutions you wish to support: alma mater, medical center, your place of worship
- Identify the issues most important to you: homelessness, specific physical illnesses or disabilities, hunger, wilderness/parks, peace initiatives, education/literacy/libraries, arts and music
- Identify the major organizations which serve the issues of interest, whether on a local or national level
- Winnow down the list by deciding to which you want to give and assign an annual dollar amount to each
- Note whether you want to give annually, quarterly, monthly or weekly
- Decide if you want to have some paid automatically using your credit card or checking account. Make a note of this next to the organization's name on your list
- Use this list to keep track of donations throughout the year, indicating form of payment (check or credit card), date, and amount

If you make donations online, here are two tricks:
1. Keep your list next to your computer and note "online payment" via name of credit card
2. Set up a separate email account where solicitation emails and receipts from charitable organizations can collect and easily be found later on

Daily Discipline: As you sort through the mail, put aside all charitable requests in a basket or file. In a separate folder, "Charitable Donations, (Year)," place receipts for donations already made. Compare the incoming requests with your list, throwing out any that are not on the list or ones to which you have recently made a donation. Decide how frequently you will deal with the remaining requests.

Telephone Solicitations For seniors – write this clearly near their phones and encourage them to follow the script.

- **Say "no" to requests**
- **Say "no" to giving credit card information**
- **Say "no" to pledges**
- **DO SAY: I don't accept phone solicitations. Send me something in writing and I will consider it. And please put me on your Do Not Call list.**