



# *Your* Personal Philanthropy Planner

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Define your charitable giving strategy  
and make an impact for generations to come.

## Our Mission

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Strengthening community by  
connecting people, resources and needs.



COMMUNITY  
FOUNDATION  
OF THE LOWCOUNTRY

# Start Your Journey

**Do you plan your philanthropy? If your answer is “no,” you’re not alone. Most people don’t.**

While we take the time to plan our annual budgets and consider how our assets will be divided up at our death, very few of us sit down to consider how we want to give money away, whether during our life or after. We want to change that. Community Foundation of the Lowcountry’s mission is to strengthen the Lowcountry by connecting people, resources and needs. We exist, literally, to work with donors from across this great region to make the Lowcountry an even better place – now and into the future.

We think everyone – regardless of income, regardless of net worth – should have a personal giving plan, and we have created this planner to help you start your own journey.

To get you started, within the chart below, consider the organizations that received your five largest cumulative gifts in the last year. You can include the total dollar amounts or just rank them 1 to 5, largest to smallest. Next, check the boxes that correspond to the reasons why the donations were made. If there is more than one reason, check all that apply. If you volunteered your time, indicate that as well.

## Was the gift....

**Friend Driven** - Donations made to an organization because a friend made a personal request, such as asking you to an event or fundraiser.

**Life Driven** - Donations made to organizations that are part of your daily life – place of worship, your alma mater, your child’s school.

**Impulse Driven** - Unplanned donations to address immediate needs, such as natural disasters or something you saw on the news.

**Mission Driven** - Donations to organizations that align with your personal values and interests.

	Total \$ or Rank	Organization	Friend Driven	Life Driven	Impulse Driven	Mission Driven	Time Contributed
1							
2							
3							
4							
5							

# Identify Your Values

**Our lives and experiences shape our personal values, revealing what's most important to us.**

Values can be rooted in faith, tradition, career or personal interests. This exercise will help you identify the most important values to consider as you give. We've listed a few to get you started. Feel free to add any not listed here. Choose your top 10, then narrow your list to five, and finally select your top three.

Adventure	Knowledge
Balance	Leadership
Challenge	Legacy
Collaboration	Openness
Community	Opportunity
Compassion	Personal Experience
Competence	Power
Courage	Prosperity
Creativity	Resilience
Curiosity	Respect
Dignity	Responsibility
Diversity	Risk-taking
Education	Security
Empowerment	Self-reliance
Entrepreneurship	Self-respect
Equity	Service
Excellence	Simplicity
Fairness	Social Justice
Faith	Social Responsibility
Family	Success
Forgiveness	Sustainability
Freedom	Tolerance
Friends	Transparency
Happiness	Trust
Harmony	Wealth
Honesty	_____
Humility	_____
Impact	_____
Inclusion	_____
Independence	_____
Innovation	_____
Integrity	_____

## My Top 10 Values

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## My Top 5 Values

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## My Top 3 Values

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Focus Your Giving

**Given so many issues and needs, it can be challenging to identify a focus for your philanthropy.**

A community's health can generally be tied to how well it addresses issues in the eight categories we've listed below. These categories provide a framework for your overall giving strategy, whether you give locally, nationally or internationally. Select and rank the five issues that are most important to you, then eliminate two.

## Basic Needs

- Access to Nutritious Food
- Affordable Housing
- Homelessness
- Poverty Alleviation (domestic)
- Social Justice/Civil Rights

## Health and Wellness

- Access to Affordable Health Care
- Adoption/Foster Care Services
- Animal Welfare/Companionship
- Domestic Support Services
- Domestic Violence/Sexual Assault
- Medical Research
- Mental Health
- Preventative Care/Wellness
- Seniors/Long-term Care
- Substance Abuse
- Veterans

## Arts and Culture

- Access & Participation
- Arts & Music Education
- Helping the Arts Flourish
- Historic Preservation
- Performing Arts
- Public Media, Radio/Television
- Visual Arts

## Education

- Adult Basic Education
- Continuing Education/Lifelong Learning
- Early Learning
- English Language Learners
- Higher Education
- Libraries
- Literacy
- Youth Programs

## Vibrant Communities

- Civic Education/Engagement/Participation
- Community Building
- Community Revitalization
- Faith Communities/Religious Organizations
- Immigrants & Refugees
- Parks & Open Spaces
- Policy & System Change
- Public Safety
- Social Support

## Thriving Economies

- Economic Development
- Economic Resilience
- Gender Wage Gap
- Small Business/Entrepreneurship
- Workforce Development

## The Environment

- Endangered/Threatened Species
- Environmental Education/Advocacy
- Environmental Equity
- Environmental Stewardship/Protection

- Sustainable Agriculture
- Sustainable Development/Transportation
- Wildlife Conservation/Protection

## Global Issues

- Clean Water/Sanitation
- Disaster Relief/Recovery
- Disease Eradication/Vaccines
- Economic Opportunity
- Education (global)
- Empowering Women/Girls
- Gender-based Violence
- Health (global)
- Infant Mortality
- Land Rights
- Leadership/Advocacy/Social Change
- Poverty Alleviation (global)

### My Top 5 Issues

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### My Top 3 Issues

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Create Your Plan

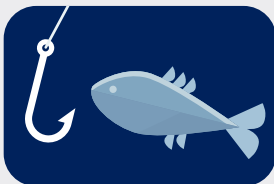
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**What impact do you want to have on the issues you're most passionate about? Consider these three primary strategies for creating change.**



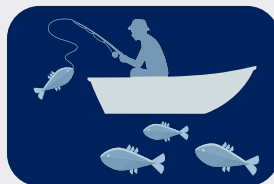
## Relief

Provides direct service to those requiring immediate help. *Gives someone who is hungry a fish.*



## Prevention

Identifies causes and proactively offers services and support to avoid the need for services in the future. *Teaches someone who is hungry how to fish.*



## Reform

Advocates improvements in current systems, laws and policies. *Ensures that all people have access to bait, tackle and an unpolluted lake so they can fish.*

**Once you understand what drives your philanthropy, the next step is developing a plan that ensures your charitable giving is in line with your values, interests and desire for impact.** After completing this exercise, many people find they haven't been as focused as they would like - targeting their giving to the things they care about the most.

The professionals at **Community Foundation of the Lowcountry** ([cf-lowcountry.org](http://cf-lowcountry.org)) can help you plan and find the best fit for your philanthropy. A trusted philanthropic advisor to over 400 fundholders in the Lowcountry, we work hand-in-hand with donors and their professional advisors. Because we've been serving the community for nearly 30 years, we have a deep understanding of community needs and the nonprofits that strive to meet them. We hope you will reach out to learn more about how we can help you with your philanthropic goals.



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