



*Align Your Wealth
with Your Heart.*



YOUR CHARITABLE GIVING PLAN

GUIDED BY GRUNDEN FINANCIAL ADVISORY, INC.

WELCOME!

This workbook is designed to help you create a personal charitable giving plan that reflects your values, goals, and the impact you want to make. At Grunden Financial Advisory, Inc., we believe thoughtful planning leads to meaningful change — in your life and in the communities you care about.

Once completed, this workbook can serve as an ongoing guide. Your Giving Purpose Statement, along with the other insights you've recorded, can help you evaluate future giving opportunities to help ensure they align with your charitable intent. If you'd like support at any point in the process, our team is here to help.

STEP 1: Clarify Your Motivation for Giving

REFLECTION QUESTIONS:

- What experiences have shaped your desire to give back?
- Who inspired you to give or volunteer?
- Is there a cause or event that feels especially important to you?

ACTION:

Write a short paragraph describing your personal motivation for giving.

My Motivation for Giving:

STEP 2: Develop a Giving Purpose Statement

REFLECTION QUESTIONS:

- What causes are most important to you?
- Where do you want to make an impact?

ACTION:

Draft a statement combining your values and your vision for change.

My Giving Purpose Statement:

STEP 3: Assess Your Time, Talent, and Treasure

REFLECTION QUESTIONS:

- How much time can I commit?
- What skills or expertise can I offer?
- What financial resources am I able to contribute?
- Does my gifting change post-retirement?

ACTION:

List what you can realistically give.

Time I Can Offer:

Talents/Skills I Can Offer:

Financial Contributions I Can Offer:

STEP 4: Research Charities to Support

ACTION STEPS:

- Use Charity Navigator, GuideStar, or a community foundation to research.
- Choose one to three organizations.

Organizations I'm Considering:

Notes on Each Organization:

STEP 5: Plan Effective Financial Giving

ACTION STEPS:

- Explore strategies like Donor Advised Funds (DAFs) or Qualified Charitable Distributions (QCDs).
- Consult your financial advisor.

My Financial Giving Strategy:

Advisor Meeting Notes:

STEP 6: Involve Your Family (Optional)

REFLECTION QUESTIONS:

- How can I make giving a family tradition?
- How can I engage my children or heirs in philanthropy?

ACTION:

List ways to include family in your giving journey.

Ways to Engage My Family:

STEP 7: Integrate Giving into My Estate Plan

ACTION STEPS:

- Identify which accounts are most tax efficient to gift after life, and to whom.
- Determine if you want to leave charitable gifts in your will.
- Work with your advisors to formalize your wishes.

Charitable Legacy Goals:

Next Steps with Advisors:

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