

# UNCOVERING your personal PHILANTHROPIC VALUES



Sage Capital Advisors, INC.  
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Integrated Wealth Design

We have found that giving in a way that supports your family's values and beliefs is often more personally fulfilling. Use this worksheet to help define your family's mission, values, and philanthropic priorities. When you are ready to discuss philanthropic planning with us, bring this worksheet to our meeting to help us understand your priorities.

What life experiences have held deep meaning for our family?

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

What are the core values that define us?

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

How do we demonstrate those values every day?

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

**How would we like our values to inform our financial strategies?**

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**Why do we want to give as a family?**

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**What intentional legacy do we want to leave behind?**

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**What problems, injustices, and causes move us to action?**

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**What can we do to help?**

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**Which organizations are currently working on this issue?**

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

**Which ones have a mission that resonates with our goals and values?**

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

**What will it take to have an impact on the issue?**

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**What goals do we want to achieve with our philanthropy?**

- To give as a family
- To pass our values on to the next generation
- To create an enduring legacy
- To make an impact on a cause we care about
- To support our religious beliefs
- To improve our community
- To support our personal values
- To lower our tax burden

**What organizations have we given to in the past?**

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