

# Leaving A Lively Legacy: A Diabolically Effective Plan for Social Change:

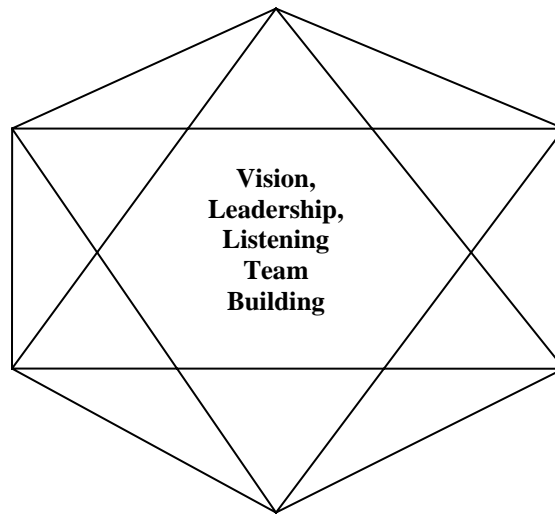
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11/15/2007

## Benefits To Self, Family, and Society:

- Happiness, Justice, Survival

## Logic Model, Or Theory of Social Change

- Connects money, talent, time, and energy to love, community and results now and in the future



## Allies & Amplifiers

- Nonprofits
- Fellow Donors
- Political Leaders
- Organizers
- Volunteers
- Thought Leaders
- Activists
- Networks: Many-to-Many
- Emergent movement

## Self & Family:

- Life Story
- Luck, Fortune, Grace
- Self Reliance
- Traditions
- Community
- Heritage
- Worldview
- Moral Compass
- Political Views
- Civic Engagement
- Public Service
- Identity
- Character
- Spirituality

## Time Frame for Giving:

- Now
- Later
- At Death
- Beyond Death

## Finances:

- Financial Plan,
- Estate Plan
- Giving Plan with Source of Philanthropic Funds:
  - Checkbook
  - Assets
  - Foundation
  - Donor Advised Fund
  - Charitable Lead Trust
  - Charitable Remainder Trust
  - And other Tools
- Plans also free up time to invest in inspired organizations or projects

## To The Few, Among Many:

- Who leads and who follows in the dance of donor, advisors and nonprofits?
- Who leads and who follows in the dance of democracy?
- How will you in concert with others become an active agent for the good?

This chart is adapted from one created by Peter Frumkin in his excellent book, Strategic Philanthropy. I am also indebted to Tracy Gary's Inspired Philanthropy: Creating a Giving Plan and Leaving a Legacy