

My Life Work, My Inspired Legacy:

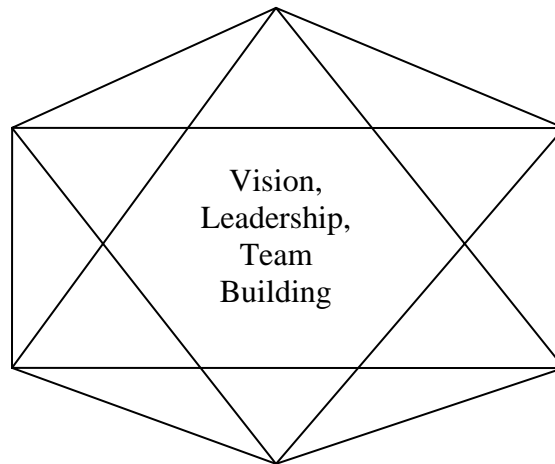
The Scope of Effective Philanthropic Planning

Created by Phil Cubeta
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Benefits To Self, Loved Ones and Society

Logic Model

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



Recipient: Creating Social and Personal Impact

- Nonprofit
- Project inside Nonprofit
- Social investment
- Political cause

Time Frame for Giving:

- Now
- Later
- At Death
- Beyond Death

Identity:

- Family,
- Life Story
- Traditions,
- Community
- Heritage
- Worldview
- Values
- Politic Views
- Spirituality

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

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