The Generosity Effect

Charitable plan tracker

This isn't a form—it's a conversation tool to use with your advisor. Complete only the sections that feel meaningful.

Client name/contact

Advisor name/contact

Charitable vision

Begin with purpose. These insights guide everything else.

Values/motivations that inspire your giving:

Causes, communities, or organizations you care about:

Impact or legacy you'd like to create:

Giving budget and preferences

Clarify what giving looks like for you today—and what you want it to look like going forward.

Budget

- ☐ Fixed dollar amount:
- ☐ Percentage of income:

Timing

(E.g., year-end, quarterly)

Preferred methods

Check any that apply:

- ☐ Cash/ACH/check
- ☐ Appreciated securities
- ☐ Donor advised fund (DAF)
- ☐ Qualified charitable distribution (QCD)
- ☐ Complex assets (business interest, real estate, etc.)
- ☐ Other:

Additional considerations

Tax-related:

Estate/Legacy:

Other:

Who's on your team?

Professional

Estate attorney, tax advisor/Certified Public Accountant, insurance professional, charity gift officers, DAF custodians, nonprofit board colleagues, foundation trustees, etc.

Personal

Spouse/partner, adult children, parents/in-laws, siblings, grandchildren, close friends, spiritual advisors, etc.

Your charitable planning team

Document who helps you make decisions, offers guidance, and facilitates gifting.

Name	Role	Phone/Email	Notes

Next steps (advisor + client)

Document the steps needed to move from intention to action.

Task	Responsible party	Completion date

Charitable planning reviews

Plan intentional moments to revisit goals, celebrate impact, and adapt as needed.

Cadence

- ☐ Quarterly
- ☐ Annual
- ☐ Semi-annual
- ☐ Other

Method(s)

- ☐ In person
- ☐ Zoom/virtual
- ☐ Group call
- ☐ Other

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