

A Guide to Creating **YOUR PERSONAL GIVING PLAN**



A booklet provided by the
 **HAMILTON
Community
Foundation**
www.hamiltonfoundation.org

Welcome

Giving to a cause you care about is so important when it comes to sharing your treasure. Whether looking to spark real change, tackle some of the world's biggest issues or simply support community programs and services, discovering the how, why and to whom you want to give is the first step. However, deciding how you give, how much to give, and where to donate can be overwhelming with so many options available.

Crafting a strategic giving plan enables you to make deliberate choices about where and how to donate your time or resources. It also provides peace of mind, freeing you from guilt when declining other giving opportunities. This booklet is designed to guide you in establishing that plan.

While personal passions and convictions guide our giving decisions, it's crucial to remember we're not often making these choices in isolation. Everyone in your family might have their unique charitable priorities. Engaging in conversations about each others giving priorities can be a bridge to understanding and building consensus. It not only strengthens our bonds but also ensures that the impact you make as a unit resonates with everyone's heart and vision.



The steps

1

Finding my WHY
for giving.

2

Figuring out HOW
I want to give.

3

Discovering WHAT
I should consider

4

Envisioning my
potential **IMPACT**

WHY I GIVE



Understanding why you want to donate is essential, as it allows you to be more intentional and connected with your giving. Knowing your “why” helps you identify causes and organizations that align with your values and beliefs, ultimately making it easier and more meaningful to engage in charitable giving.

Exercise 1

MY ULTIMATE GIFT

Imagine for a moment that right now you could make a gift that would change your community in an impactful way. **What would that gift do?**

Reflect for a moment on the idea of this gift. Why is this your ultimate gift?

WHAT DOES THE COMMUNITY FOUNDATION DO?

At Hamilton Community Foundation and Affiliates, we believe that philanthropy is more than just giving money. It's about creating a lasting impact and building a better community. Through our creative philanthropy, vision, and leadership, we are committed to inspiring change and making a difference in the lives of those around us.

WWW.HAMILTONFOUNDATION.ORG

Exercise 2

WHY I HAVE GIVEN

On the page below, write out as many personal experiences, stories, and values that have previously moved you to donate or engage in charitable giving. This could include experiences that directly inspired you to donate to a cause, attend a protest, educate yourself as an ally, or volunteering your time. The number of experiences you list doesn't matter, so don't overthink it.

Reasons we give...

to help other families like ours and build community awareness

to support the community we love forever

to bring people together and create spaces for progress

to mentor and provide opportunities for young adults in my community

to unlock new worlds for our youth, fostering joy and endless possibilities through their experiences



Exercise 3

MY GIFTING MOTIVATIONS

Understanding which motivations resonate most with you can significantly shape and refine the way you give over time. By prioritizing these motivations, you are taking the first step towards creating a giving plan that is uniquely yours and aligns with your values and aspirations. Rank these motivators one through four or simply check the ones that resonate the most with you.

PAYING IT FORWARD

☐

This motivator is rooted in gratitude for past kindnesses received, inspiring individuals to give back and contribute positively to the lives of others, fostering a cycle of generosity and reciprocity. Common motivator amongst things like scholarships and social support programs.

LIFE EXPERIENCES

☐

Experiences, whether joyful or challenging, can deeply shape one's giving motivations, leading to a desire to make a difference in areas that hold personal significance or have impacted one's life journey. Such gifts might aim to create a legacy for a loved one or provide support for causes that have touched the life of the donor or their family.

SOCIAL GIVING

☐

Characterized by contributing with others, often through events or by sponsoring activities that bring joy to the community. This motivation is driven by the desire to create shared experiences, strengthen community bonds, and contribute to the collective happiness and well-being of others.

PURE ALTRUISM

☐

Simply wanting to help others, driven by a genuine concern for the well-being and welfare of individuals and communities, without expecting, or often wanting, anything in return. Altruistic gifts are often the most flexible gifts aiming to generally support an organization or community.

Your “why” doesn’t need to be complicated. It can be as simple as “I’ve benefited from a charity myself so I want to give back” or “I have witnessed family members or friends impacted by this cause and want to support others who may be going through the same thing”.

The answers from this exercise will help guide you to form the rest of your strategic giving plan and make your donations even more meaningful.

Now, take a look at all of your answers and see if you can identify a common theme or motivator that could answer the question “Why do I give?” Write this down below.

WHY I GIVE



HOW I GIVE



As you journey through crafting your personal giving plan, it's vital to understand the many dimensions of giving. Beyond just monetary donations, there are five fundamental "T's" that encapsulate the broad spectrum of contributions you can make.

Time Investing hours into volunteering, mentoring, or directly serving causes and communities that matter to you.

Talent Utilizing your unique skills, expertise, or knowledge to benefit charitable or community efforts.

Testimony Sharing personal stories and experiences to raise awareness, inspire others, and advocate for causes close to your heart.

Ties Leveraging your networks, connections, and relationships to introduce and connect causes with potential supporters.

Treasure Offering financial resources, be it through one-time donations, ongoing support, or planned giving, to empower organizations and initiatives.

Giving Now Making a onetime contribution to directly address and support pressing needs or current projects of a charitable cause.

Ongoing Support Committing to regular or periodic donations, ensuring sustained assistance and stability for your chosen organization or initiative.

Giving Later Structuring future financial gifts through wills, trusts, or beneficiary designations, ensuring your assets are available to you in life while supporting the causes you care about even after your lifetime.

WHAT I GIVE TO



Having clarified your 'why', it's time to delve deeper into the 'what'. Identifying the social causes that resonate most with you is a pivotal step in refining your charitable giving strategy.

To assist you in this process, on the next page are some overarching themes encompassing various social causes during your brainstorming.

Reflect on your answers to the question “Why I Give”. Below, list the common causes that echo through your experiences. There is no fixed number of causes to include; feel free to list as few or as many as resonate with you.



Lastly, put a star next to the cause you listed that is most important to you.

COMMON CAUSES TO CONSIDER

HUMAN & ANIMAL NEED

Food Insecurity

Disaster or War Relief

Homelessness

Animal Shelters & Adoption

Community Gardening & Nutrition

Spay & Neuter Programs



HEALTH & WELLBEING

Suicide Prevention

Support for Specific Health Conditions

Mental Health Services

Substance Abuse Prevention & Rehabilitation

Age-related Wellness Programing

Education



CULTURAL & COMMUNITY VIBRANCY

Public Art, Murals, and Sculpture

Performing Arts

Arts Education & Workshops

Community Events

Historic Preservation

Public Spaces & Community Development



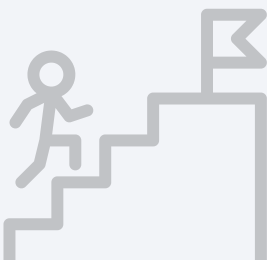
SOCIAL JUSTICE & EQUITY

Gender & Racial Equality

Women's Rights

LGBTQIA+ Issues & Support

Accessibility & Support for the Disabled



PROTECTING YOUR CHARITABLE INTENT

The Hamilton Community Foundation & Affiliates play a pivotal role in safeguarding your charitable intent, ensuring that regardless of where your gift is directed, its purpose is preserved for the long term. Should a designated program or nonprofit cease to exist in the future, even a century from now, the foundation board diligently reallocates your gift, continuing to honor and support the cause or purpose you initially intended.



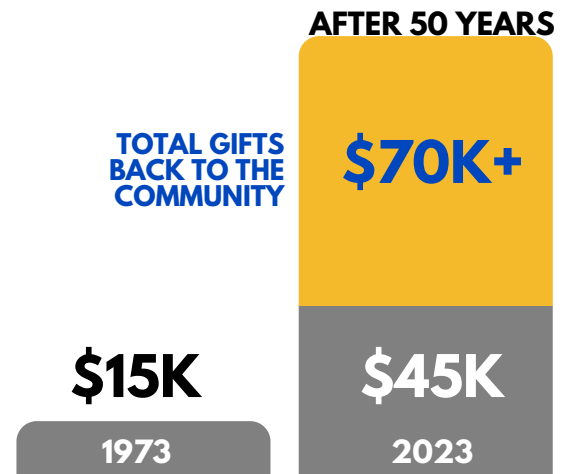
Partnering with your community foundation offers a powerful and effective way to make a lasting impact. With the option to establish an endowed fund that grows over time, your gift will provide ongoing support for the causes you're passionate about. Moreover, the foundation's expert team is adept at facilitating even the most intricate forms of giving, ensuring that your philanthropic vision is realized to its fullest potential.

With tools ranging from donor advised funds to scholarships, designated funds, and more working with your local community foundation offers you a personalized tool kit for giving in a way that is impactful for you and your family. Ready to amplify your charitable impact? **Discover the many ways to partner with the foundation for your charitable goals by calling Jacob Stone-Welch at 513-341-6985 today!**

THE POWER OF AN ENDOWMENT

AN EXAMPLE: THE GEORGIA LUKES FUND

In 1973 Mrs. Georgia Lukes, a custodian of First Financial Bank, left a \$15,092 bequest to the Hamilton Community Foundation to support her community. Fifty years later, that fund has grown to more than \$45,000 and continues to provide ongoing support to the community through the unrestricted grant fund. Last year alone the Georgia Lukes Fund provided nearly \$2,000 in community support. In total Mrs. Lukes gift has provided more than \$70,000 over the years.



When thinking about a potential endowment fund, generally you can assume a 7.5% average annual growth rate, a 4-5% gift back rate, and a 1% fee supporting the Community Foundation. Keep in mind that real-world returns may vary yearly due to market fluctuations. Usually, the amount available for gifting is based on the fund's rolling average balance to keep giving levels consistent. However, donors have the flexibility to set their own rules for how their endowment's funds are disbursed.

WHAT IMPACT CAN I MAKE?

As you reflect on the thoughtful work you've completed, from understanding the depth of your 'why' to discerning 'what' and 'how' you wish to give, it's time to manifest your charitable intentions.

Take a moment to consider both your immediate and long-term giving goals, aligning them with the causes and methods that resonate with you. Use the space below to jot down these aspirations, creating a roadmap to guide your philanthropic journey.

Remember, our charitable inclinations evolve as we do. It's beneficial to revisit this exercise every few years, ensuring that your giving remains aligned with your heart's truest desires.

THE IMPACT I WANT TO HAVE



Short Term	Long Term

Taking the first step in your philanthropic journey begins the moment you decide to act. While you might not be able to support every cause right away, this guide equips you with the tools to revisit and refine your strategy over time. Discover the essence of intentional giving, and seek guidance to ensure every act of generosity resonates with your purpose. The Hamilton Community Foundation is poised to support you throughout your journey.

About the Foundation

Created in 1951, The Hamilton Community Foundation is the largest community foundation in Butler County, managing more than 800 individual, family and corporate funds, as well as nonprofit agency endowments. As a public charity with \$160 million in assets, we focus daily on helping make our community a better place to live, work and play.



**Ready to get
started on your
personal giving
journey?**

For more information on how the Foundation can help you with your charitable giving, contact:

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