AmPhil GIVING

YEAR-END GIVING GUIDE

Make Your Giving Decisions with Confidence and Clarity

1 REFLECT ON PAST GIVING

- Which gifts have brought you the greatest fulfillment?
- Which organizations made a real difference?
- Were there requests you said “yes” to out of obligation, not conviction?
- Have the organizations you support stewarded your gifts well?
- Are you confident in your ability to give or would you benefit from some guidance?

2 CLARIFY YOUR PRIORITIES

- What problems or causes stir your heart?
- What interests, experience, or relationships do you have that call you in a particular way?
- What institutions have shaped you and your community for good?
- Are the organizations you’ve supported in the past aligned with your priorities?
- Are there important causes you value but haven't yet supported?

3 SET YOUR GIVING BUDGET

- What’s realistic to give from current funds given your financial situation?
- Do you have additional funds available from a donor-advised fund, corporate match program, IRA, or other vehicle?
- Are there any commitments you’ve already made but haven’t fulfilled?
- Are there tax considerations that make year-end giving advantageous?

4 MAKE DECISIONS

- If you identified gaps in your giving or wish to give more, research additional options and seek recommendations from trusted friends, advisors, or community leaders as needed
- Gather any requests you've received and records of past giving
- Review the options and decide what to fund and at what level, engaging family members or others in the process as desired

5 PLAN FOR ENGAGEMENT

- Which organizations would you like to visit or learn more about?
- Are there events to attend or volunteer opportunities that would deepen your connection?
- How else can you encourage and support nonprofit leaders doing excellent work?

6 MAKE YOUR GIFTS AND COMMUNICATE

- Notify organizations you'll support and initiate gifts
- Graciously decline personalized requests that don't align with your priorities
- Document your decisions and reasoning for future reference

STILL OVERWHELMED?

We'd love to be a resource to help you give with clarity and confidence.

AmPhil Giving provides strategic guidance and hands-on support for donors seeking to give in line with their principles and priorities.



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