Familanthropy
Family + Giving
Welcome
Welcome and Introductions .............................................Kelly Dunkin

Familanthropy ...............................................................Crystal Thompkins

Questions and Answers ..................................................All

Family Giving ...............................................................Ghazal Vaghedi
Together,
Making Good Possible.
How do we make good possible?

We listen relentlessly.

We are local champions.

We fearlessly innovate.
Impact Areas
For Grantmaking and Community Building

- **Connected and Resilient Neighborhoods**
  - Social Connection, Collaboration

- **Essential Needs**
  - Food insecurity, Housing and Wellness

- **Economic Prosperity**
  - Real estate, interest rates, workforce, innovation

- **Civic Engagement, Advocacy**
  - Community, volunteering, service-learning
What impact areas are you most excited about?

- 50% Essential Needs
- 17% Civic Engagement
- 10% Connected & Resilient Communities
- 22% Economic Prosperity
About

BNY MELLON

Vera Divenyi
Client Strategist
Crystal Thompkins
Head of Philanthropic Solutions
Forces Creating Change

**Accelerated Disruption**
- COVID-19
- Social and economic unrest
- Legislative changes since 2017: TCJA, SECURE Act, CARES Act

**Demographics**
- Five Generations Operating Simultaneously
- Younger Generations (X, Y & Z) seek whole systems change.
- Each generation views funding change differently

**Social Investing**
- Move away from binary thinking between non- and for-profit
- Find optimal mix of business models and funding sources to solve problems
Five Generations Working Together: Differences Impact
Flow of Philanthropic Capital

- **Traditionalists**
  - Mid 1920s to 1945
  - Conservative and respectful of authority
  - Loyal to country and certain businesses
  - Believe strongly in supporting nonprofit institutions
  - Less adept with new technologies

- **Baby Boomers**
  - 1946 to 1964
  - Largest individual segment of population initially at 75 Million, falling to 71 Million by 2019
  - Struggle with relationship to traditional institutions: older Baby Boomers behave like Traditionalists while younger Baby Boomers have less trust in institutions

- **Generation X**
  - 1965 to 1980
  - Highly educated – 35%
  - 55% of all business startup founders fall in Gen X
  - Less trust in and adherence to tradition & institutions
  - Rise of women in corporate life and as social investors

- **Millennials**
  - 1981 to 1996
  - Technologically savvy
  - Do not trust institutions
  - Independent problem solvers, avoiding mistakes of the past
  - Learning Opportunity – do they have enough historical context?

- **Generation Z**
  - 1997 to 2012
  - The most digitally connected generation
  - Short attention spans, hyper-informed consumers
  - Financially conservative due to the 2008 global financial crisis
  - Strong values rooted in social activism and equality

Source: Pew Research Center
Source: Generation Impact: How Next Gen Donors Are Revolutionizing Giving
Four Stories

1. Grad School
2. Childcare Entrepreneur
3. Food Desert Food Trucks
4. A Wedding Story
Ghazal Vaghedi
Vice President of Business Development and Community Engagement
Let’s dream big... and make good possible!

1. Explore ColoradoGives.org
2. Open a Donor-Advised Fund
3. Convert a private family foundation
4. Explore Impact Investing.
5. Create a legacy.
Your team

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Thank you!

How’d we do? Take our Event Survey.
Download our Family Discussion Guide for Giving.
Disclosure Appendix

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