

# Philanthropy is Personal

What matters to you? Your giving should connect with your values and beliefs in a way that is meaningful. We work hand-in-hand to identify the causes you care about most. Then we provide guidance on the best ways to meet your charitable goals. It's comforting to know you're not alone in the sometimes-complex world of philanthropy.

Our personalized service will help you make an impact on issues affecting our community and beyond. Together, we can make good happen.

*Below are some questions that might help guide your approach to charitable giving.*

## What are your charitable priorities?

- Basic Needs (access to food etc.)
- Housing
- Crisis response (after a disaster)
- Animal welfare
- Senior Citizens
- Environment
- Arts
- Education
- Health & Wellness
- LGBTQ+
- Diversity, Equity and Inclusion
- Religious
- Children & youth
- Other

*This question can be hard to answer. Here are some prompts that may help provide clarity:*

- Are there people or specific groups you particularly worry about?
- Are there problems that occupy your mind or that perhaps you've had personal experience with?
- Are there places you love and that you want to protect for future generations?
- Is there a particular philosophy or approach to dealing with problems or societal issues that you want to support or expand?
- Are you a member of any groups that have special meaning? A church or college alumni group?

## What kind of impact do you hope to make with your charitable giving?

- Solve current and critical needs
- Help the largest number of people possible
- Make a significant difference in the lives of a few
- Address long-term, systemic issues
- Support nonprofit capacity building
- Help Jefferson County thrive
- Support technology that empowers nonprofits

## What is your financial path?

*Major life events often drive changes to an estate plan and prompt charitable gifts. Which of the following transitions might be relevant to you now and in the future?*

- Selling a business
- Change in marital status for you or your heirs
- Retirement or estate planning
- Receiving an inheritance
- Birth or coming of age children/grandchildren
- Death of a loved one

## What are your personal preferences?

*Some people like a tasteful level of recognition for their good work. It attracts attention to their cause, generates awareness and may inspire others to give. Some prefer anonymity. What do you prefer?*

- Lasting recognition (name on an endowment fund or permanent structure)
- Public recognition (name in public announcement or media coverage)
- Simple recognition (personal thank you and name listed in annual report)
- Anonymity

## Involvement

*Do you want to play an active role in your giving, selecting recipients of your gift for years to come? Would you like to involve your children or grandchildren? Or would you prefer one-time gifts with no future demands?*

*Many busy but charitable people choose to receive personalized services that allow them to focus on the more rewarding aspects of giving. What are the services you would find helpful?*

- No personal involvement
- Future personal involvement through children
- Current personal involvement
- Future personal involvement through grandchildren
- Learn more about community needs and funding opportunities
- Facilitate family discussions about charitable giving
- Schedule site visits or opportunities to learn more about nonprofit organizations

## Building a Charitable Plan

*Together, we can create giving plans that maximize the impact of your gifts today and in the future. Here are just some of the giving options we can facilitate:*

- IRA Charitable Distributions
- Donor-Advised Funds (Direct or Advisor-Managed)
- Planned Giving
- Giving Groups

As a nonprofit and community foundation, our mission is to make good happen. We look forward to serving as your partner in making your charitable goals come to life.

For more information or to get started, contact us at [720.898.5900](tel:720.898.5900) or [Philanthropy@CommunityFirstFoundation.org](mailto:Philanthropy@CommunityFirstFoundation.org)