



# Ann Arbor Area Community Foundation

## CLIENT CONVERSATIONS

### The Charitable Giving Conversation with Clients

Very giving people might not recognize what they do as “philanthropy,” so questions should be about common charities, such as religious, higher education and community organizations.

**Do you currently volunteer at or financially support any charitable organizations, such as a house of worship, your alma mater, or a local arts association, social service agency, or civic group?**

We also find that many people have been long-time, loyal annual donors to a beloved nonprofit. Talking with them about “annuitizing” their annual giving, even at modest levels, to continue through an endowed legacy gift for the nonprofit is a feasible and attractive option.

#### VALUES & MOTIVATIONS

- What was the most meaningful or satisfying gift you’ve ever made?
- What do you love about this area?
- What change would you like to see in our community?
- What principles have guided the way you’ve lived your life? Raised your family? Run your business?

#### REASONS FOR AFFILIATIONS

- Did a specific nonprofit organization ever help you or your loved ones? If so, what impact did it make on you?
- What attracted you to the organizations you have given to thus far?
- Which past donations have given you the most satisfaction? Any frustrations?

#### ORGANIZING GOALS

- What vehicles are you using for your charitable giving?
- How involved are you or do you want to be in managing your charitable giving?
- Do you prefer to donate publicly or anonymously?

#### LEGACY

- How would you like to be remembered? What kind of “legacy” do you want to leave?
- Do you want your giving to occur primarily during your lifetime or after your death?
- Are you interested in supporting organizations you care about after your death?

#### INTENTIONS

- Have you talked with anybody (other advisors or family members) about how you want your wishes to be represented in your annual giving? In your estate plan?
- Would you like to learn how you can provide appropriately for your family while also providing meaningfully for your favorite charity or for the community at large?
- Are you open to ways of giving that benefit both the charity and yourself?