

# Your dreams      Your gifts

# Your legacy

*Careful planning is the key*

## **Define your passion**

- What issues do you care about?
- What organizations do you currently give to?
- What gives you the greatest satisfaction?

## **Create your plan**

- If you could change three things in your community, what would they be?
- Do you prefer to fund buildings, operations, or projects?
- How much involvement do you want with the causes you support?

## **Determine your giving level**

- What are your financial objectives?
- What is your tax situation?
- What is your own charitable comfort level?

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## **Implement your strategy**

- Seek information about philanthropic opportunities from your community foundation.
- Prioritize needs, programs, and opportunities.
- Determine best giving instruments to accomplish financial goals.

## **Review and update your plan**

- Evaluate results: did your gifts accomplish what you hoped they would?
- Has your financial situation changed?
- Are there changes in tax law relevant to your giving?

***Share your responses with your advisors (tax, legal, investment, and accounting).***



The vision is solid—  
*from acorn to oak*



This tool is provided for you by The Portsmouth Community Foundation  
We are here to help you achieve your charitable dreams and touch the future in your own special way.

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