

# Involving family in philanthropy

When giving, involving family in your philanthropy can create substantial charitable impact. Younger generations can learn the value of giving—leading them to give more over their lifetime—and provide current support for nonprofits, while older generations can instill the value of giving and educate about the causes they care about—shaping their giving legacy.

Below are some key activities that families can do together to engage in active philanthropy. Review the activities you are already doing in the “Current activities” box and check those that you wish to do using the “Future activities” box. If you are already doing any of these activities, you are on track to impact your family’s philanthropic traditions. If there is more you would like to do, use this worksheet to plan how you will engage family in giving—creating lasting charitable impact together.

## Current activities

### Charitable conversations

- Discuss charitable passions and interests
- Choose charities to support
- Select assets to contribute (cash, stock, etc.)
- Select and manage giving tools (Donor-advised fund, private foundation, etc.)

### Experiencing philanthropy

- Volunteer
- Attend fundraising events
- View art shows or performances
- Donate food and goods (clothing, toys, etc.)
- Organize events for charity

### Planning

- Create a family mission statement
- Discuss estate planning roles
- Consider estate beneficiaries (family, religious organizations, secular charities, etc.)
- Discuss your charitable legacy

## Future activities

### Charitable conversations

- Discuss charitable passions and interests
- Choose charities to support
- Select assets to contribute (cash, stock, etc.)
- Select and manage giving tools (Donor-advised fund, private foundation, etc.)

### Experiencing philanthropy

- Volunteer
- Attend fundraising events
- View art shows or performances
- Donate food and goods (clothing, toys, etc.)
- Organize events for charity

### Planning

- Create a family mission statement
- Discuss estate planning roles
- Consider estate beneficiaries (family, religious organizations, secular charities, etc.)
- Discuss your charitable legacy

Now that you know what you want to do in the future to engage your family in giving, plan how to put these ideas into action.

Using the boxes below, create a strategy to include your family members in philanthropic activities. To further increase engagement, ask for their input on the plan—making your family’s philanthropy truly a collaborative effort to make an impact.

### Charitable conversations

Start or continue an open and honest dialogue about charitable interests and financial giving goals.

### Experiencing philanthropy

Determine how to participate as a family in charitable activities such as volunteering or delivering goods to those in need.

### Planning for the future

Define the future of your philanthropy—including, who you’d like to involve, where you’d like to give, and how philanthropy impacts your estate plans.

For more strategic giving resources,  
visit [vanguardcharitable.org/resourcecenter](http://vanguardcharitable.org/resourcecenter)