



FamTecSM
Family + Technology

Why am I completing the Individual Philanthropic Vision deliverable?

Our passions in life are unique to each of us. This deliverable will guide you to define the charitable causes most important to you and will answer questions such as: How can I clearly articulate and preserve my charitable interests? How can I narrow my focus and increase my impact?

What is the Individual Philanthropic Vision deliverable?

This deliverable will define the charitable cause most important to you, as an individual. Before you can identify a shared charitable vision, for the entire family, you must be able to clearly identify, share and discuss your charitable passions.

How is the Individual Philanthropic Vision deliverable completed?

24 statements will be provided. For each set of statements, you will select if the statement is a “priority now”, “not a priority now”, etc. In the end, a pie chart will appear on your individual output. On the Family Summary page, your top two charitable causes will be presented.

Source: Internal Revenue Service: Each category represents how the IRS classifies how individuals give to charitable causes.