Getting the conversation started

If you could ask your clients two or three questions that help them define the impact they want to make, what would you ask?

The Community Foundation partners with advisors like you to give your clients a robust understanding of how they'd like to support the charitable causes they care about.

The key is helping clients "know thyself." You might start the giving conversation with:

- What principles have guided the way you've lived your life? Raised your family? Run your business?
- Do you currently volunteer at or financially support any charitable organizations? Which ones, and why?
- Are you interested in supporting your church, alma mater, or other charities that have special meaning to you, whether during lifetime or through your estate?
- What personal legacy do you want to leave?
- What are your charitable priorities?
  - Solving specific, current, critical needs
  - Making a difference in the lives of specific people
  - Supporting a new or existing nonprofit
  - Helping the largest number of people possible
  - Providing operational support for a favorite nonprofit
- If you were to create a fund, what interest areas would you support? (Community, faith organization, education, homelessness, environment, hunger, arts and culture, health care, children and youth, senior citizens, veterans, animals, other?)

Resources for Professional Advisors

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