

# INTENTIONAL PHILANTHROPY – MAKING YOUR GENEROSITY COUNT

## SPRING 2023 – OSHER OLLI UD

### Course Outline / Learning Objectives

Session	Date	Topic	Concept / Learning Objective
One	TBD	<ul style="list-style-type: none"> <li>Overview: Philanthropy in the US/Nonprofit Sector</li> <li>Philanthropy – Past &amp; Present</li> </ul>	<ul style="list-style-type: none"> <li>Introduce participants to the scope/size of the philanthropic and nonprofit sectors</li> <li>Provide an overview of the history of philanthropy in the US</li> </ul>
Two	TBD	<ul style="list-style-type: none"> <li>Intentional Philanthropy – What Inspires you to give – Time, Treasure and Talent</li> </ul>	<ul style="list-style-type: none"> <li>What inspires you to give?</li> <li>Creating your philanthropic mission statement</li> <li>Selecting charitable causes and organizations to support – due diligence tips</li> <li>Leveraging your charitable support – time, treasure and talent</li> </ul>
Three	TBD	<ul style="list-style-type: none"> <li>What Will Be Your Legacy?</li> </ul>	<ul style="list-style-type: none"> <li>Defining your charitable legacy. How do you want to be remembered?</li> <li>Tools and techniques for inspiring multi-generational philanthropy -Family models that work</li> <li>What does it mean to “leave a legacy?”</li> </ul>
Four	TBD	<ul style="list-style-type: none"> <li>Charitable Vehicles – What makes sense for you?</li> </ul>	<ul style="list-style-type: none"> <li>IRS Charitable Giving Rules – the basics – time, talent and treasure</li> <li>Charitable gift planning is not just for the uber-wealthy</li> <li>Strategies for charitable giving – tools and techniques</li> </ul>

<b>Five</b>	TBD	<ul style="list-style-type: none"><li>▪ Current Topics</li></ul>	<ul style="list-style-type: none"><li>▪ Topics of current interest in the philanthropic sector</li><li>▪ Closing thoughts</li></ul>