

Intentional Philanthropy

Course Description

Course will be conducted over zoom in a lecture with discussion format.

Weekly Layout:

- ☰ Overview: Philanthropy in the US/Nonprofit Sector
- ☰ Philanthropy – Past & Present
- ☰ Introduce participants to the scope/size of the philanthropic and nonprofit sectors
- ☰ Provide an overview of the history of philanthropy in the US

- ☰ Intentional Philanthropy – What Inspires you to give – Time, Treasure and Talent ☰
- ☰ Creating your philanthropic mission statement
- ☰ Selecting charitable causes and organizations to support – due diligence tips
- ☰ Leveraging your charitable support – time, treasure and talent

- ☰ What does it mean to “leave a legacy?”
- What Will Be Your Legacy?
- ☰ Defining your charitable legacy. How do you want to be remembered?
- ☰ Tools and techniques for inspiring multi-generational philanthropy
- Family models that work

- ☰ Charitable Vehicles – What makes sense for you?
- ☰ IRS Charitable Giving Rules – the basics – time, talent and treasure
- ☰ Charitable gift planning is not just for the uber-wealthy
- ☰ Strategies for charitable giving – tools and techniques

- ☰ Current Topics
- ☰ Topics of current interest in the philanthropic sector
- ☰ Closing thoughts