



Howard and Linnea Green

Many people come to a point in their lives where they feel inclined to give back. They do so for a number

of reasons, all very personal to them. What motivates you? Perhaps you feel strongly about a cause. Perhaps an organization has touched your life or the lives of loved ones. Maybe you want to create a legacy and set an example that inspires others to give, or perhaps your giving is a way to get your family together and pass along your values to younger generations.

For as many motivations as there are to give, there are ways of giving. The key to having a rewarding giving experience is finding the best fit—for your charitable priorities, financial goals, and personal preferences. This checklist is designed to help you and your professional advisor(s) determine the custom giving solution that's right for you.

## What are your charitable priorities?

### Charitable interests

You may have a single charitable interest—an important cause or organization. Or you may have several, or a desire to explore new community needs and opportunities as they arise. Note the charitable interests that you'd like to pursue.

- Community development
- Arts
- Health & human services
- Education
- Faith organization
- Alma mater
- Environment
- Youth
- Service organization or agency
- Other \_\_\_\_\_

### Impact

What kind of impact do you hope to make with your charitable gift?

- Solve specific, current, critical needs
- Help the largest number of people possible
- Make a significant difference in the lives of a few
- Construct buildings that will endure for generations
- Support operations of nonprofit organizations
- Address long-term, systemic social issues
- Other \_\_\_\_\_

### Perpetuity

Should your gift last forever? You can endow your gift so that only the income is spent and the principal becomes a growing source of community capital. Or, you can choose to spend all of your charitable assets. What is your preferred timetable?



Planting trees with Bradley United Methodist Church

The key to having a meaningful giving experience is finding the best fit—for your charitable priorities, financial goals, and personal preferences.

- Give all direct gifts with no endowment
- Give some direct gifts with no endowment; endow some gifts
- Give only endowed gifts

## What are your financial goals?

### Assets and taxes

Most large gifts present the opportunity for significant tax deductions. Some people choose to give during high-income years to defray their taxes with deductions. You may wish to donate appreciated securities or real estate to avoid taxes on the sale of these assets. And, charitable bequests can play a role in estate planning for your heirs. Your professional advisor can help you assess the financial and tax implications of giving the following kinds of assets:

- Cash
- Retirement savings
- Appreciated securities
- Closely held stock and business assets
- Real estate, fine art, or other property
- Life insurance
- Other asset

\_\_\_\_\_

\_\_\_\_\_

### Timing

Maybe you would like to start giving now, so you can get involved or potentially see the results of your gift. Or perhaps you'd like to give through your estate. Most philanthropists choose a combination of these. What is your timing preference?

- Give all gifts during lifetime
- Gift some lifetime gifts; some after death
- Give all gifts after death

### Income

Some people choose to give in a way that provides them—or a loved one—with a stream of income for life. Your professional advisor can help you select a giving vehicle that suits your time horizons, tolerance of risk, and income requirements. What kind of income would you like your estate to provide?

- Predictable lifetime income for you and your spouse
- Predictable lifetime income for you or your spouse
- Maximum lifetime income for you and your spouse
- Maximum lifetime income for you or your spouse
- Provide income to a charity during your lifetime

## What are your personal preferences?

### Recognition

Some people like to be recognized for their good work. It attracts attention to their cause, generates awareness, and may



Bunk beds provided for families through the furniture ministry of Love INC.

inspire others to give. Some people prefer anonymity. What level of recognition do you prefer?

- Lasting recognition (name on a fund, foundation, building, or permanent structure)
- Public recognition (name in public announcement or media coverage)
- Simple recognition (personal thank you and name listed in annual report or newsletter)
- Anonymity

### Control

Is ultimate control over assets you give to charity important to you? Some people aren't comfortable without it. Others are glad to let go, once they've made some guiding decisions. Determining the range that's comfortable for you will help your advisor recommend appropriate giving vehicles.

- Less control
- Some control
- More control

### Involvement

Do you want to play an active role in your giving, selecting recipients of your gift for years to come? Would you like to involve your children or grandchildren? Or would you prefer to make one-time gifts with no future demands on your time?

- No personal involvement
- Current personal involvement
- Lifetime personal involvement
- Future personal involvement through children
- Future personal involvement through grandchildren

### Personalized service

Many busy, charitable people choose to receive personalized services—assessment of community needs, administration of their philanthropy, investment management—that allow them to focus on the more rewarding aspects of giving. What are the services and information you would find helpful?

- Understanding community needs
- Evaluating charitable giving options
- Establishing a philanthropic plan
- Conducting due diligence of selected organizations
- Providing grant administration
- Managing investments
- Facilitating family meetings and charitable activities
- Bookkeeping
- Tax reporting

## I would like more information about the Hancock County Community Foundation

Please provide information about:

- Community Funds administered by HCCF
- Establishing a named endowment fund
- Gift options
- Including a fund(s) at the Community Foundation in my estate planning
- Arranging a speaker to visit my organization's meeting

## Give where you live, Grow where you live

The following nonprofit organizations enrich and enhance life in our community. They have had the foresight to establish endowment funds that will provide critical annual operating income. You are invited to consider their endowment fund as an option for your charitable plans.

- Boys & Girls Club of Hancock County
- Bradley United Methodist Church
- Edelweiss Equine Assisted Therapy Center
- Fortville-Vernon Township Library
- FUSE
- Greenfield Parks Department
- Hancock County 4-H Agricultural Association
- Hancock County Food Pantry
- Hancock County Historical Society
- Hancock County Public Library
- Hancock County Senior Services
- Hancock County Veterans' Park
- Hancock County Youth Camp
- Hancock Hope House
- Kenneth Butler Memorial Soup Kitchen
- Leaders in Navigating Knowledge
- Love INC
- Mental Health Partners
- Nameless Creek Youth Camp
- Sugar Creek Township Park
- The Arc of Hancock County
- Town of McCordsville



**Hancock County Community Foundation**  
312 E. Main Street, Greenfield, IN 46140  
317-462-8870 • giveHCgrowHC.org



## DECIDING TO GIVE

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