What does the Philanthropy Platform do?

Greater joy and confidence in giving is obtained when you know what you want to accomplish and how to do it. Excellence in Giving's Discovery™ Process and Giving Game Plan™ guides clients towards an understanding of their vision and how to achieve it. The Financial Advisor Philanthropy Platform is a revenue-sharing arrangement that allows advisors to profitably deliver EIG services directly to clients. The result is a more dynamic suite of services that financial advisors can offer and increased impact and satisfaction for their philanthropically active clients.

Step 1

Discovery Process. The Discovery™ Process is a comprehensive assessment of a client's personal giving priorities and philanthropic mission. It allows families and individuals to gain clarity in their mission and goals and articulate the values that will direct their giving. The process enables them to strategically concentrate their giving in areas where they feel the greatest satisfaction and will have the greatest impact.

The Discovery Process involves two steps:

1. Clients complete the ***Discovery Questionnaire***

Sample Discovery Questions include:

- "Describe 2 or 3 events during your younger years that most impacted your view of life."
- "What do you value most? What would you most hate to lose? Why?"
- "What is your biggest hope and biggest fear related to money?"
- "What do you do that gives you the greatest sense of personal significance?"

2. Excellence in Giving creates a ***Joy-Filled Giving Profile*** (see sample insert)

What does the *Giving Profile* do for a client?

- Defines the purpose and priorities of the client's giving based on Questionnaire
- Spells out what gives a client joy and takes away joy in the giving process
- Measures potential giving opportunities against the number of giving priorities it fulfills

Proactive, Values-based Advisory Services. Without well-defined giving priorities and strategic charitable allocations, clients rush at the end of the year to make tax deductible donations. That type of reactive giving to organizations and opportunities that show up in the mail does not create lasting satisfaction. Deep personal significance grows out of following personal values and creating a legacy. As a financial advisor, you are moving your clients towards financial security and success. Why not introduce them to the joy of generosity?

Step 2

Giving Game Plan. Developing a giving strategy is the first step in becoming a proactive, high-impact philanthropist. Excellence in Giving has found that clients who purposefully direct their giving to areas they care about experience greater overall satisfaction. The strategic planning process guides clients through decisions about which topics, people, and places they want to impact with their giving. It provides a platform for evaluating the satisfaction level from last year's giving and adjusting next year's allocations to better align with the client's mission.

Developing a ***Giving Game Plan*** takes two simple steps:

1. Clients complete the ***Giving Portfolio*** using 1-5 years of giving records (see sample insert)

How does a client complete a *Giving Portfolio* planner?

- EIG recommends using 3-5 years of giving records
- The ***Giving Portfolio*** can be completed by hand or electronically
- Financial Advisors walk them through the document or clients complete it independently

2. Excellence In Giving creates the client's ***Giving Game Plan*** (see sample insert)

Elements of the Giving Game Plan include:

- Annual and 10-year giving goals
- Topical and geographic giving targets
- 3-5 year trends in total giving
- Major gifts satisfaction evaluation
- 3-5 year trends in giving by topic
- Target average grant size & number

Financial Advisor Philanthropy Platform **Benefits**

- Deepen relationships between financial advisors and their clients
- Create an additional revenue stream for financial advisors
- Increase client satisfaction from executing the strategic giving plan
- Provide a competitive advantage for the advisor over the competition

Excellence in Giving
the joy of generosity

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