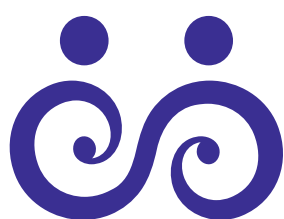


YOUR PATH OF PHILANTHROPY

Workbook



Wakatipu
Community
Foundation



YOUR GIVING LEGACY STORY

At the Wakatipu Community Foundation, we believe that a charitable legacy comprises so much more than just a monetary gift. Every donor has a unique giving story and your charitable legacy is an important part of our communal history. Creating a Legacy Plan and Legacy Story through this workbook can help you to connect with your motivations for giving, as well as to preserve your charitable legacy for years to come.

By documenting your giving story now, you are essentially creating a roadmap for your future philanthropic efforts, which will serve as a way for successive generations to access your charitable intentions and inspirations even after you are gone. This process may even impact the way you think about your current giving. You want to live your life with purpose, ensure your life's work and passions live on, make your donor intentions clear, and outline a path for stewardship of your philanthropic wishes after you are gone.

This workbook will help you uncover and document your values, stories, life lessons, family traditions and passions to help inform and inspire your philanthropic giving.

This exercise will help you...

- Live your life more intentionally
- Clarify what is important in your life, family and giving
- Ensure your philanthropic wishes are appropriately stewarded throughout the generations
- Provide a foundation for financial, life transition and philanthropic decisions
- Improve generational communication and relationships
- Inspire generational generosity
- Provide a cherished gift for family and future generations

Helpful Tips:

- While you are working through the guided writing exercises in this workbook, consider any photographs you may have that will help bring your story to life. You will have the option to share copies of these photos with family members and/or the Community Foundation upon completion of the workbook.
- Anything you write in the following pages is yours to keep, so please feel free to write freely. When you have completed the exercises, you will have the opportunity to choose how much or how little is shared with family members and/or the Community Foundation.
- Your legacy journey need not stop here. If you are interested in going further, Community Foundation staff members are always available to discuss additional legacy planning services.

INTRODUCTION

The actions of local people can transform lives in our community. This community giving spirit is evident in each moving story of impact we hear and experience. These stories of generosity and legacy-building combine to create your giving legacy story.

The Foundation created this book to walk you through the process of discovering what you want your giving story to be – investigating your passions, values, and options for your philanthropy in partnership with us. Whether you are just learning about community foundations or are ready to take the next step in establishing a Legacy Fund through the Wakatipu Community Foundation, the activities and information in this book are for you.

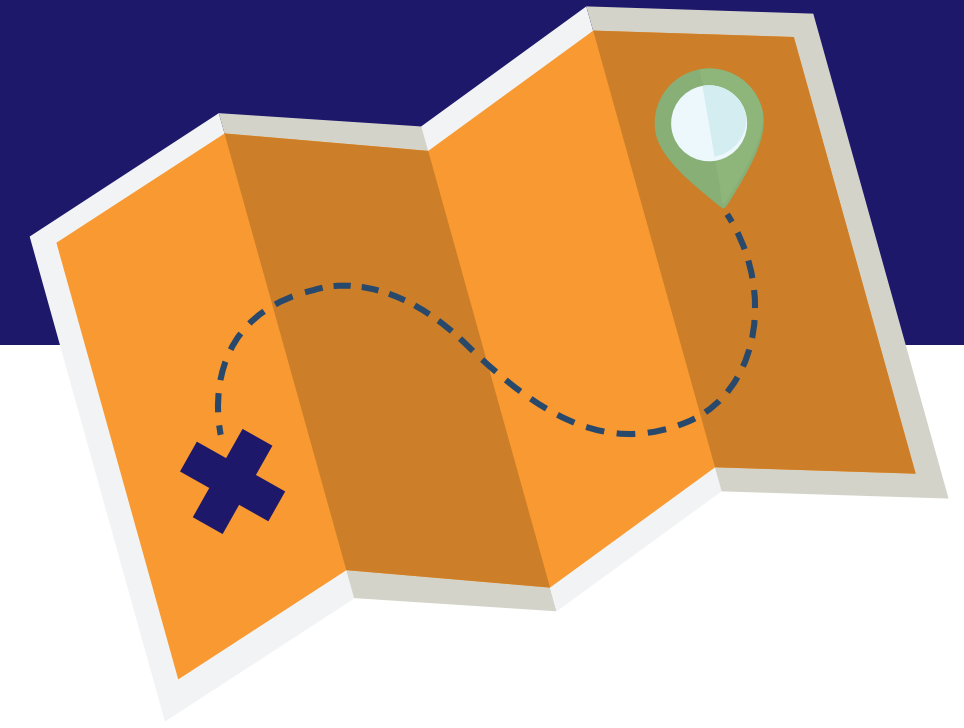
You have the opportunity to be an integral part of the giving story in our community, making a positive difference long into the future. It's time to write your own giving legacy story.

Please note this can be your private journal to help you develop your beliefs, used to help the WCF represent your interests and you make the decision if you want the recipients to know more about you or you may want to be completely anonymous - it is your choice and we are here to represent you!

We are deeply honoured to be on this journey with you.



SHARE YOUR STORY



These important details of your life will guide your philanthropic plans as well as assist Foundation staff to identify your interests and path to giving.

Name:

Address:

Date of Birth:

Birthplace:

If you're not native to the Queenstown area, what brought you here?

Other places you've lived:

Parents' Names:

Education (Secondary, Tertiary, etc.):

Military Service:

Employment History/Career Fields:

Civic Memberships:

Religious Affiliations:

Children's Names and DOBs:

Personal Interests (Hobbies, Cultural Interests, Other Activities):

START YOUR GIVING JOURNEY



Have you ever taken a step back and analysed your giving history? We would like to help you recognise your philanthropic patterns and reasons you chose or will choose to donate your hard-earned money to great causes.

Why do you give? Or why would you like to give? *(In just a few words, tell us what inspires you to give back.)*

Take a moment and think about how you've given back in recent years.

Have you volunteered your time and skills or donated money to support causes you care about?

List the organisations you've supported in the past and tell us why.

Where do you focus your philanthropy?

- I support one cause and give to that organisation every year.
- I have a few specific interests or targeted geographic areas that I support.
- I am passionate about many causes and different locations.
- I am spontaneous with giving and donate as issues arise.
- Other:

Organization

Reason for Support

Frequency

Program Area

**ABC Library*

I'm a former educator

Annually

Children's literacy

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

**The first row is an example.*

Then, ★ which giving experience gave you the most gratification.

Then, ✕ which giving experience gave you the least satisfaction.



LIVE YOUR GENEROUS LIFE

Not only do the organisations you donated to appreciate your generosity — our community is a better place because you care. We would like to help you realise the power of your giving and the possibilities to change the world in the future.

How do you choose what organisations and projects to support?

- I make all giving decisions based on my own interests.
- Family members identify organisations and projects.
- We review information sent from organisations and choose which projects match our goals and interests.
- We develop guidelines for our philanthropy and allow organisations to apply for funding through an application process.
- Other:

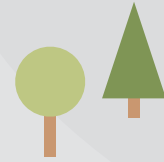
If you could solve a problem, what would it be?

What has been your MOST meaningful act of generosity?

What has been your LEAST meaningful act of generosity?

With whom do you discuss your giving decisions?

PICTURE YOUR LEGACY



Do you want to bring positive change to the world? Do you want to show others that someone cares? Leaving your philanthropic legacy is not only beneficial for your family, it is needed to provide an example to all.

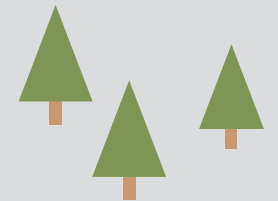
What do you want your community to remember about you?

What do you want your family and loved ones to remember about you?

RECORD YOUR VALUES

Values play a major role in how we live our lives. What are your values? Circle any that apply.

- | | | |
|------------------|--------------|-----------------|
| Acceptance | Faith | Personal Growth |
| Access | Family | Preservation |
| Acknowledgment | Freedom | Pride |
| Change | Generosity | Privacy |
| Collaboration | Happiness | Respect |
| Commitment | Healing | Responsibility |
| Communication | Honesty | Security |
| Community | Humility | Self-expression |
| Compassion | Independence | Self-reliance |
| Conservation | Innovation | Service |
| Creativity | Integrity | Simplicity |
| Democracy | Involvement | Stability |
| Dignity | Joy | Tolerance |
| Diversity | Justice | Transformation |
| Education | Knowledge | Truth |
| Empathy | Leadership | Wisdom |
| Entrepreneurship | Loyalty | Other(s): _____ |
| Equality | Merit | _____ |
| Excellence | Opportunity | _____ |
| Expertise | Passion | |
| Fairness | Peace | |



NOW, ★ YOUR TOP 5.



IDENTIFY YOUR AREAS OF INTEREST

Peruse the list below and circle the areas that pique your interest.

ADULT EDUCATION & LITERACY

ANIMALS

- Animal Welfare & Protection
- Wildlife Protection
- Zoos & Aquariums

ARTS, CULTURE & HUMANITIES

- Historical Preservation
- Literary
- Performance
- Visual

CIVIL RIGHTS & ADVOCACY

- Civic Engagement
- Equal Rights
- Public Policy & Advocacy

COMMUNITY IMPROVEMENT

- Neighbourhoods
- Public Spaces

CRIME PREVENTION & LEGAL SERVICES

DISASTER PREPAREDNESS & RELIEF

DISEASES, DISORDERS & MEDICINE

- Medical Research

ECONOMIC DEVELOPMENT

EDUCATION

- Primary & Secondary
- Higher Education
- Preschool
- Scholarships
- Specialised Tutoring

EMPLOYMENT

- Job Training & Placement
- Vocational Counselling

ENVIRONMENTAL

- Botanical
- Natural Resources & Conservation
- Recycling
- Water

FAITH-BASED ORGANISATIONS & RELIGION

FINANCIAL LITERACY

FOOD, AGRICULTURE & NUTRITION

- Agriculture Programs
- Food Pantries & Foodbanks
- Hot Meal Programs
- Meal Delivery

HEALTH & WELLNESS

- Disability
- Health Care Delivery
- Mental Health & Crisis Intervention
- Substance Abuse

HOUSING & SHELTER

- Affordability
- Home Improvement & Repairs
- Homeless Shelters
- Senior Housing
- Subsidised Housing

HUMAN SERVICES

- Accessibility
- Aging
- Children, Youth & Family Services
- Domestic Violence

INTERNATIONAL AFFAIRS & NATIONAL SECURITY

MARINE SCIENCE & OCEANOGRAPHY

PARKS & RECREATION

PHILANTHROPY & VOLUNTEERISM

PHYSICAL & EARTH SCIENCE

SCIENCE & TECHNOLOGY

- Astronomy
- Biological & Life Sciences
- Chemistry
- Computer Sciences
- Engineering & Technology

TE AO MĀORI

- Environmental
- Cultural enhancement
- Supporting Māori aspirations

YOUTH DEVELOPMENT

- After-School Programmes
- Early Childhood
- Service Clubs
- Youth Centres

DID WE FORGET ANYTHING?

WRITE IN ADDITIONAL AREAS OF INTEREST:



TRY TO NARROW YOUR LIST DOWN TO YOUR TOP 5:

- _____
- _____
- _____
- _____
- _____

SET YOUR GIVING GUIDELINES

Will you divide your giving into percentages that match your identified areas of interest?
Or, will you allocate a portion of money for your family members to support their favorite causes?

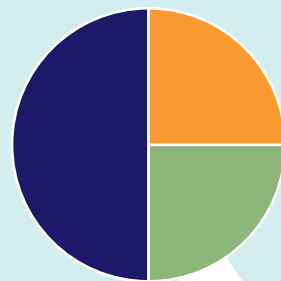
Example of Areas of Interest

- 50% food pantries and foodbanks
- 30% domestic violence
- 20% current issues



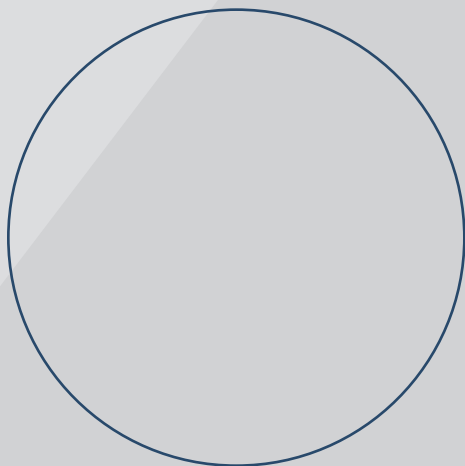
Example of Shared Family Interests

- 50% parents allocate
- 25% child #1
- 25% child #2

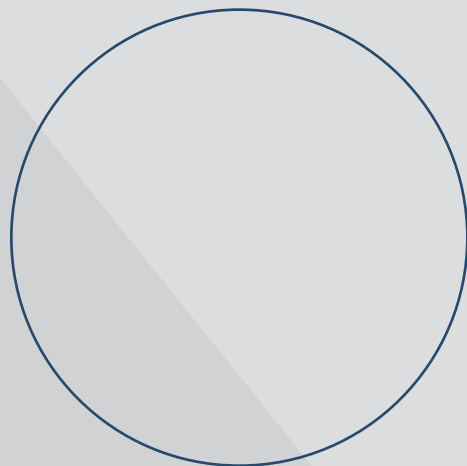


Use these charts below to illustrate your own giving guidelines.

AREAS OF INTEREST



SHARED FAMILY INTERESTS



DEFINE YOUR ABSOLUTES

Are you only willing to support organisations within your areas of interest? Yes No

Will you give to causes outside of your community? Yes No

Ask yourself, what are your absolutes?

Example: I will only support animal rescue and adoption programmes.

Under no circumstances will we support organisations outside of ABC Township.

SEE YOUR GIVING IN ACTION

We want your charitable giving to have as much impact as possible. Seeing your generosity's power can come in many forms. How would you like to see your gifts in action? Check all that interest you.

- I would like to see the impact of my gift through a detailed written report along with pictures documenting the success of the organisation.
- I would like to hear a simple testimonial from a client or staff member of the organisation demonstrating the impact of my gift.
- I would like to have a conversation with the programmatic staff of the organisation or perhaps the Executive Director.
- I would like to see firsthand the difference I am making with my generosity through a site visit.
- Other:



CREATE YOUR GIVING PLAN

After you've completed these unique giving exercises, look back at your responses and start crafting your giving plan or mission statement that details your charitable goals.

Example: Our fund seeks to improve the quality of life for disabled individuals in ABC Township.

We accomplish this by supporting therapeutic programmes and agencies that provide independent living assistance.

Now that you have completed *Your Path of Philanthropy*, a member of our Team will follow up to schedule a time to review your responses and provide guidance on how you can be more strategic in your giving. We will also develop your Legacy Giving Story with you if you would like.

If you choose to share this workbook with us, your workbook responses will only be shared with Foundation staff and with successors named in your Fund Agreement.

We are here to help you
every step of the way on

YOUR PERSONAL PATH **OF PHILANTHROPY**



Your Community. Your Legacy. For Good.

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