

THE COMMUNITY FOUNDATION FOR CARVER COUNTY

HELPING YOUR CLIENTS EXPLORE CHARITABLE ESTATE GIFTS

The following questions were prepared to help professional advisors explore fact-finding, feeling and motivational questions as they help their clients determine the gift portion of their estate plan.

Fact-finding questions that lead to feelings and motivations:

1. What charities have been important to you?
 - Charities that served your family
 - Charities that you have supported financially
 - Charities to which you have provided leadership
2. Who are the family members you have concern for now and in their future?
 - Concerns about their age when they will inherit
 - Concerns about their financial situations
 - Concerns about any special needs they may have
3. Do you have personal financial concerns?
 - Concerns about retirement income
 - Concerns about health care
 - Concerns about having enough money to travel
 - Concerns about taxes you and your estate will owe

Feeling questions:

4. What concerns do you have about the future of your charitable interests?
 - Concerns about continuing their missions or expanding their services
 - Concerns about people who will need their services
 - Concerns about continuing your annual charitable giving after your life is completed.
 - Concerns about what you need to do to leave a legacy you can really feel good about; a legacy that would be significant and meaningful to you
5. What are your personal concerns for yourself and your loved ones?
 - Concerns about your personal care in the future
 - Concerns about passing assets from your estate to your heirs

Motivational questions:

6. If you could change anything in the world, what would it be?
7. If you were to make an estate gift to one or more of your favorite charities, what would you want it to accomplish?
8. How much do you want to leave your heirs? Is there an upper limit?
9. Would you rather give your heirs income or capital?
10. Would you like to give less to taxes and more to your heirs and to your charitable interests?

(Prepared by Bob Golberg in 2000 for the *Wilder Foundation* and in 2008 for *The Community Foundation for Carver County*.)