



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

Inspiring Generations of Giving

GETTING STARTED: Family Giving Considerations Worksheet

Ask yourself or your family members the question for each consideration, then discuss your collective response and circle the number that best matches your answer. When you are finished, tally how many times you chose each giving vehicle. Explore the two giving vehicles you chose most frequently.

Consideration #1: Asset control.

Do you want to control your philanthropic assets for generations to come, or are you more comfortable delegating some of your control to public organizations?

1 Least Controlled
Controlled

2

3

4 Most

Direct gift

Supporting
organization

Donor advised
fund

Family foundation

.....

Consideration #2: Family involvement.

Are multiple members of your family interested in getting involved? Is more than one generation of your family interested in philanthropy?

1 Least Involved

2

3

4 Most Involved

Direct gift

Supporting
organization

Donor advised
fund

Family foundation

.....

Consideration #3: Start-up costs.

Do you wish to avoid start-up and administrative costs?

1 Least Appropriate

2

3 Most Appropriate

Family foundation
Supporting organization

Donor advised
fund

Direct gift

.....

NCFP.ORG

202.293.3424

1101 Connecticut Avenue, NW, Suite 220
Washington, DC 20036

Consideration #4: Management and administrative costs.

Do you wish to minimize the ongoing cost of management and administration?

1 Least Appropriate	2	3 Most Appropriate
Family foundation Supporting organization	Donor advised fund	Direct gift

.....

Consideration #5: Taxes.

Do you wish to maximize the tax benefits of your philanthropic gifts?

1 Least Appropriate	2	3 Most Appropriate
Family foundation Supporting organization	Donor advised fund	Direct gift

.....

Consideration #6: Public recognition.

Do you wish to control whether your gifts are public or anonymous?

1 Least Controlled	2	3	4 Most Controlled
Family foundation	Supporting Organization	Donor advised fund	Direct gift

.....

Consideration #7: Philanthropic legacy.

Do you want to support charitable wishes or multi-generational philanthropy after your death?

1 Least Appropriate	2	3 Most Appropriate
Direct gift	Supporting organization Donor advised fund	Family foundation

.....

Consideration #8: Strategic philanthropy.

Do you wish to engage in strategic philanthropy with family members over an extended period of time?

1 Least Appropriate	2	3 Most Appropriate
Direct gift	Supporting organization Donor advised fund	Family foundation