



NATIONAL CENTER FOR  
FAMILY PHILANTHROPY

## Family Giving Online Knowledge Center Options for Family Philanthropy: Descriptions and Forms

**TITLE:** Questions to Ask When Establishing a Family Philanthropy

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### QUESTIONS TO ASK WHEN ESTABLISHING A FAMILY PHILANTHROPY

1. What expectations do you have for your family philanthropy?
2. What goals do you hope to accomplish for you, your family and the community?
3. How would you describe current family relationships?
4. Would you be interested in bringing family members together to make philanthropic decisions?
5. How much of your estate do you wish to leave to your children? How much to charity?
6. Are you or would your heirs be interested in examining 'wealth replacement' strategies?
7. How will current or future income concerns affect your family or business grantmaking decisions?
8. What causes and institutions do you wish to support? Are your interests centered primarily in your local community?
9. Are your interests national or international in scope?
10. How deeply do you wish to be involved in the management and investment of funds you contribute? In the selection of beneficiaries of your family philanthropy?
11. What role would you like family members to play in your philanthropy, now and in the future?
12. Should your grantmaking last "in perpetuity"? Only during your lifetime?
13. What commitments are you prepared to make, in terms of time and capital, to a program of family philanthropy?