

## Worksheet 1: Who is Involved?

Use this worksheet to help you and/or your family think through who might participate in what role. You can complete the worksheet individually or use the questions to spark a discussion. Keep in mind: There are no right or wrong answers to these questions, yet there are implications for including—and not including—others in your philanthropy.

**Family Members:** Yes  No

If yes, which ones and how will we define “family?” (Direct bloodline? Spouses or partners? Siblings, nieces and nephews, cousins? Adopted children or stepchildren? Family of choice?)

**Trusted Allies:** Yes  No

e.g., maternal grandmother, a mentor or coach

**Community Advisor(s):** Yes  No

e.g., battling a disease; receiving financial assistance from others; observing extreme poverty

**What roles might you want to fill and why?**

e.g., board of directors, grantmaking or scholarship committee, paid consultant or contractor, staff, informal advisor

