

Realizing your philanthropic vision

Understanding your interests and intentions can help **maximize your impact**



Over 91% of US households with a net worth of one million dollars or more give to charity.

Being thoughtful and strategic about your philanthropic interests and intentions can increase the impact of your current charitable activities and enhance your family legacy for years to come.

More than 91% of US households with a net worth of one million dollars or more are engaged in some form of charitable giving. In households with a net worth of five million dollars, that number climbs to 95%.*

Philanthropy is very personal and decisions often start with what appeals to the heart, or through personal connections and experiences. But just as a strategic review can help set a business on a better track—so too can taking stock of philanthropic activity and intentions through a mindful strategic lens.

Asking yourself questions can help you hone in on what is important to you and reveal where direction and focus may be needed to heighten impact. This then can guide you in leveraging the expertise around you to determine how best to create meaningful change.

*2016 US Trust® Study of High Net Worth Philanthropy.

Where to begin?

Here's a list of open-ended questions that can help you begin to formulate and refine your philanthropic strategy.

- What do you care about? What is most important to you?

Common philanthropic interests include:

- Animals
- Arts and culture
- Community and economic development
- Education
- Environment
- Faith and spirituality
- Health
- Human and civil rights
- Human services
- Research and public policy

- Why are these issues important to you?

- How do you usually give? What assets are you giving and do you have a charitable vehicle (e.g., donor-advised fund, private foundation or other)?

- How would you like to be remembered? Do you feel that your current philanthropic activities will achieve this?

- Are others involved in your philanthropic efforts? If so, how?

Is there anything you would like to do differently in terms of giving?

- What would you like to improve or enhance in your giving strategy? Why?

- What would you like to learn more about in terms of how to conduct your philanthropy?

How may we help?

The Family Advisory and Philanthropy Services team can assist you in defining your philanthropic goals, increasing your impact and making a lasting difference in the world. In broad strokes, we can help you and your family:

- Articulate shared values and purpose
- Uncover, refine or expand on philanthropic interests
- Activate philanthropic aspirations
- Give for maximum impact
- Ensure that giving is effecting change
- Engage the rising generation in your family's philanthropy

Want to learn more?

Speak with your UBS Financial Advisor about how the Family Advisory and Philanthropic Services team can help you realize your philanthropic vision.

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