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## Sample Family Philanthropy Plan

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**Family Giving Vision** - We have been called, albeit reluctantly so, to share our journey to create a Family Giving Vision when asked in order to encourage and/or challenge others in their giving.

### **Goals**

What We Will Invest God's Treasure In: 17-month journey, that included interactions with multiple ministries that led to family giving vision; we seek out organizations that:

1. Meet the needs of the poor and suffering,
2. Demonstrate operational excellence and as a result are good stewards with the resources entrusted to them by God (both money and people), and
3. Leverage the sustainable platform they have created to generate opportunities for relational evangelism.

### **Amount**

How Much: Following the model of Rick and Kay Warren, we are going to "reverse-tithe" our estate, i.e., give away at least 90%. We will also make investments in ministries annually.

### **Principles**

- We will avoid giving a gift that is greater than 10% of organization's annual operating budget; we do not want to encourage dramatic changes in strategy due to a gift.
  - We will thoroughly investigate a ministry before putting them into the will. This process is akin to the due diligence for a new venture capital investment. We will frequently also take board seats or other significant volunteer roles. This process is akin to a long courtship. We will not make large gifts or commitments without this level of due diligence.
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### **Specifics by Year**

**Year:** 2020

**Amount(s):** \$XXX to Church, \$XXX to XX Charity, \$XXX to XX Charity

**Type of Gift:** Donor Advised Fund

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# Family Philanthropy Plan Template

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## Family Giving Vision

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## Goals (Why give?)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Amount

Percentage of your income / assets you want to give away: \_\_\_\_\_

## Principles

1. Will gift(s) meet each of your "Goals" criteria? YES NO
2. What is the ROI on your gift (example: Number of lives impacted by your gift):  
\_\_\_\_\_
3. What is the church or charity's overhead rate? \_\_\_\_\_

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## Specifics by Year

Year: \_\_\_\_\_

## Amount(s):

\$ \_\_\_\_\_ to \_\_\_\_\_

\$ \_\_\_\_\_ to \_\_\_\_\_

\$ \_\_\_\_\_ to \_\_\_\_\_

## Type of Gift: (Example: Stock)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

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## Weekly Family Rule of Life Activity Sample

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Month: March 2020

Week: March 23-29

Core Values and Vital Behaviors:

- Time with God – 2x WK
- Health – 1x WK
- Family Time -3x WK
- Giving and Serving Others – 1x Month each (Collect money weekly)

Monday Vital Behaviors:

6:30pm Dinner together as a family

Tuesday Vital Behaviors:

7:00am Morning Devotion as a family over breakfast,

Family walk after dinner.

Wednesday Vital Behaviors:

6:30pm Dinner together as a family

Thursday Vital Behaviors:

7:00am Morning Devotion as a family over breakfast,

Family walk after dinner.

Friday Vital Behaviors:

Saturday Vital Behaviors:

Collect each family-member's money, go over giving plan – Give or save for later.

Serve breakfast together at the homeless shelter

Sunday Vital Behaviors:

Family Game Night after dinner

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## Weekly Family Rule of Life Activity Template

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Month: \_\_\_\_\_

Week: \_\_\_\_\_

Core Values and Vital Behaviors:

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Monday Vital Behaviors:

Tuesday Vital Behaviors:

Wednesday Vital Behaviors:

Thursday Vital Behaviors:

Friday Vital Behaviors:

Saturday Vital Behaviors:

Sunday Vital Behaviors:

## Family Rule of Life Monthly Calendar Sample

**Month:** March 2020

**Core Values:** 1. Time with God 2. Health 3. Care for Nature and Animals 4. Relationships

**Vital Behaviors:** 1. AM Devo 2x Wk, and Church on Sundays. 2. Cooking/eating healthy together 1x Wk and Family hike 1x Month. 3. Volunteer at Humane Society 1x Month and give to Conservation Fund Monthly. 4. Family dinner on cooking nights no cell phones and Movie Night 1x Month.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 Cooking /Family Dinner	2 AM Devo	3	3 Volunteer at Humane Society
5 Church	6	7 AM Devo	8 Cooking /Family Dinner	9 AM Devo	10	11
12 Church	13	14 AM Devo	15 Cooking /Family Dinner	16 AM Devo	17	18 Family Hike and Movie Night
19 Church	20	21 AM Devo	22 Cooking /Family Dinner	23 AM Devo	24	25
26 Church	27	28 AM Devo	29 Cooking /Family Dinner	30 AM Devo	31 Give our Conservation Fund Gift	

## Family Rule of Life Monthly Calendar Template

Month: \_\_\_\_\_

Core Values: \_\_\_\_\_

Vital Behaviors: \_\_\_\_\_

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday