

Questions for Professional Advisors

to initiate philanthropy
discussions



- Beyond family and business, what is most important to you?
- Five years from now, what do you want your philanthropy to say about you and your family?
- How much is enough and how much is surplus during your lifetime? To leave your family? To leave charity?
- What legacy do you wish behind when you are no longer living?
- How do you wish to be remembered?
- What are your values? Have you discussed them with your family? Do you wish to pass them on?
- If your financial resources were unlimited, how would you spend your time and what would you do with your excess financial resources?
- Who do you want to inherit your assets from you—Family? Government? Charity?



Looking Forward. Giving Back.