

Generous Vision Questions

History. When you think about your life, what are some of your defining moments? How has each one shaped you? Do your children and grandchildren know or understand what happened and how it impacted you? What from that would you like to pass on?

Values. What are your core values – the ideals that you hold most deeply?

Legacy. What do you want your legacy to be? What would you like your giving to say about who you are and what you believe?

Philanthropy. What type of philanthropic involvement do you want to have during your remaining life? Are you investing your time and money in accordance with your values and beliefs? Would you like to be doing more?

Mission. Do you have a mission statement for your life? If so, what is your mission? If not, what would you like to accomplish with the time you have left?

Heart. When you look at your community and the world, what tugs at your heart the most and what do you wish you could change? Why is this important to you?

Family. When you look at your children and grandchildren today, what do you wish you could do for them? Not financially, but in terms of life improvement, values.

Have you considered ways to spark giving during your lifetime with your children or grandchildren? How important is that to you?

Obstacles. What do you see as your primary obstacles in accomplishing what you want to achieve? This might include time, knowledge, finances, fear, etc.

Estate. How would you like your estate distributed between Family, Charity and Taxes? Is that how it is now?