



An Individual's Giving Plan

Introducing a high net worth individual into the world of philanthropy

Opportunity A life event changed everything for Morgan, a young business woman living in L.A. Her new net worth allowed her to quit her job and devote a significant portion of her time to giving. She was new to the world of philanthropy - but excited and enthusiastic about her newfound capacity to give. She needed to organize her thoughts, focus her goals, and learn about potential grantees. She sought an introduction to the process of philanthropic giving and an understanding of the early planning work necessary to be successful in both grantmaking and personal satisfaction.

Process As a first step in helping Morgan launch her new life as a philanthropist, Sarah Hopper remotely took her client through the process of identifying core values and priority areas of interest. Sarah then guided her through the different levels of operational structure planning to establish parameters for decision-making, time commitment, family involvement, giving style, and budget. At the end of this process Sarah met with Morgan for two days of meetings. Sarah presented a detailed *Plan & Recommendation Report* that they reviewed together. Next she arranged a meeting with a seasoned philanthropist who shared personal insights and wisdom. The final part of the series involved anonymous site visits to three globally-focused organizations in Seattle.

Result Through an intensive and hands-on immersion process, Sarah helped her client identify purpose, develop confidence, and build an operational platform for a lifetime of thoughtful, intentional and meaningful giving. This platform included:

- Clear and focused mission statement and guiding principles
- Recommendations for parameters and structure related to involving family
- A personalized *Criteria Checklist* for evaluating potential grantees
- Budget structure that reflects strategic goals and grantmaking priorities
- Resources and a qualified list of prospective grantees

Value While Sarah knows that quality philanthropy is about clear focus, and efficient tools and systems, she also believes it is much more than a process; she works closely with her clients to make this profoundly personal experience one of joy, growth and meaning. What started out as a business-minded inquiry into philanthropy became a life-changing, emotional and moving transformation. Thanks to Sarah's careful tutelage, Morgan is equipped to launch a significant philanthropic career with confidence, enthusiasm AND a clear plan.

*"It has been such a great pleasure working with Sarah. I talk to all my friends and rave about what a wonderful experience this has been. She helped me keep my feet on the ground **and** encouraged my enthusiasm and inspiration – at the same time!"*
~ Morgan