



# Charitable Giving Conversation Starters

As a trusted professional advisor, you are in a key position to create the best plan for your clients by bringing their attention to charitable giving opportunities that reflect their values and help them achieve their goals. Clients may be waiting for you to initiate the conversation about charitable giving, so start the discussion today.

## Collier's Essential Questions

- What is really important to your family?
- What are your family's true assets?
- What will you do to support the life journey of each family member?
- How wealthy do you want your children to be?
- Do you feel you have a responsibility to society?
- What principles have guided your legacy plan?

## Jay Steenhuysen

- Do you recognize any element of luck, blessing, or grace in your success?

## Tracy Gary

- What would you like to change or preserve in the world?
- Has past giving reflected your hopes?
- What are the causes behind the issues?
- What might change the situation?
- Who joins you in this work?
- How will you experiment and revise?

## H. King McGlaughon

- Do you feel you have any obligations you have not yet fulfilled?

## Rabbi Mordechai Liebling

- Your last will and testament is your final teaching. What do you want it to say?

## Michael Shaughnessy

- What kind of person do you want to be?
- In what kind of world?

## Joe Breitenher

- If your family had a crest what would be the motto?
- What keeps you awake at night?

## ADDITIONAL QUESTIONS

- What is your vision of a better world?
- What conditions are needed to realize it?
- What are the obstacles?
- What parts of the vision are realistic and what ideas, strategies and plans can make it so?
- When you were younger, were there things you wanted to accomplish in life you have not done yet?
- How might you get back to that while you still have time?
- Beyond self and family, is there anything else in the world on which you would like to have a positive impact?