

2024 Philanthropy Worksheet

When I think about my life, these are the things that I value and that I want to support:

As I think about focusing my giving for greater impact, these are the charitable entities I want to support:

In the past year, I have given to these charities in these amounts:

The types of giving I used last year to make these gifts included:

- | | |
|---|--|
| <input type="checkbox"/> Annual exclusion giving to individuals | <input type="checkbox"/> Qualified Charitable Distribution from an IRA (over age 70 ½) |
| <input type="checkbox"/> Lifetime exclusion giving | <input type="checkbox"/> Other charitable vehicle |
| <input type="checkbox"/> Donor Advised Fund | |

What I learned from my giving last year:

What types of limitations do I have with giving this year?

Adjusted Gross Income :

30% (appreciated stock) :

60% (cash to charities) :

This year I want to give \$

in total. These are the ways I'll give this year:

I plan to make some of these gifts in memory or in honor of these people who have played a meaningful role in my life:

