

Giving involves both the head and the heart. It's not one size fits all. It's about relationships, so it's a given that it's complicated. Most likely there are multiple reasons for giving. The top motivators for the Ultra High Net Worth (UHNW) distilled from the University of Indiana study for Bank of America and The Philanthropic Initiative study for US Trust ("Insights on Wealth and Worth", 2015):

1. Pass on our "values not just valuables"
2. Pass on "enough," but "not too much" to heirs
3. Prepare heirs for inheritance
4. Achieve social impact
5. Live up to civic responsibilities

P.S. Taxes are #7. Supporting interests, setting an example for children, changing the world and even family tradition are more important than taxes. Advisors are really good at explaining tax consequences and planning to the greatest tax advantage. It's time to flip the discussion on its head and lead with "Above the Line" or values-based questions to explore clients' why, purpose, and values then build a plan to accommodate those. What tax strategy best supports the mission and giving strategy (not the other way around)?

~Slide 18 - Questions Donors Have~

Their concerns may lie in the **unknown**. Many haven't yet dug deep to find out where their passions lie, what matters to them. And they're not convinced they know the right match for their gifts, how much they can afford to give, how to know if they're making an impact (2016 Study of High Net Worth Philanthropy by US Trust with University of Indiana Lilly Family School of Philanthropy). You can help them feel more confident about not only their choice to give but also the choices they make along the journey to understand and become more philanthropic.

~Slide 19 - Strategy Supports Mission~

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~Slide 20 - Questions for Clients~

These strong questions will help you guide your client to success as you work to put together the solution:

- **What** do you want to accomplish? (remember my mom, help find a cure for cancer, increase access to affordable housing, start a foundation, teach my kids about the environment, etc)
- **When** do you want to start this work?