



Inspired Philanthropist's Checklist
Modified from Tracy Gary's book, Inspired Philanthropy

Action	Applies to Me	I Aspire to	Does not Apply Me
Know my values and what or who inspires my giving			
Create a giving plan and budget and give throughout the year			
Have a vision of the effect I want to have			
Do my homework and meet leaders and groups			
Coordinate my financial plan, my giving plan, and my estate plan for consideration of my legacy goals			
I have informed my advisors of my intentions as well as my family			
Align my giving, investing, and volunteering with my values			
Evaluate agencies and leaders I intend to invest in			
Increase my giving annually as inflation adds to the cost of nonprofits' work			
Look for models and solutions beyond and within my local community			
Stay committed as a donor for more than one year			
I jot down in my phone or a notebook, ideas I want to explore			
Mentor other donors			
Work for lasting change by seeking the root causes of social, environmental or other issues			
Seek transformative, system-shifting solutions			
Be an early donor to a funding campaign and give gain at the end to help the campaign meet its goals			
I provide seed and/or pilot testing capital to a project			