



FAMILY PHILANTHROPY

Doing Good by Giving Well

We believe that philanthropy, and the process of giving back, should be a joyous and meaningful experience. Also, that giving as a family, across all generations, can help instill and reinforce important values and beliefs that bring families together and create enduring legacies. And yet, many families feel they don't have access to the right information, knowledge and expertise to be truly effective in their giving or to realize the impact and benefits of their philanthropy.

To help families navigate these challenges and to better understand how to make the most of their philanthropy, Affinity offers **Giving Well** family sessions. Each **Giving Well** session is a private and personal consultation with a philanthropic expert to answer any questions you may have about philanthropy and charitable giving. It is an opportunity to better understand effective giving strategies, which philanthropic vehicles make the most sense for your family, and how to creatively engage and involve family members in the giving process.

Giving Well sessions are perfect for families seeking to make the most of their charitable giving and to take their philanthropy to the next level. Topics and areas of focus can include:

Family Philanthropy

- How to choose the right giving vehicle for your family
- How to develop a family Mission, Giving Statement and Giving Guidelines
- How to involve your children to reinforce family values, teach financial literacy and instill the importance of giving back

Donor Advised Funds

- Understanding the advantages and disadvantages of having a donor advised fund
- How to make better grants and choose the right charities to support
- Creative ways to involve children in grantmaking

Private Foundations

- When to consider creating a private foundation
- Planning for the future of your family foundation
- Getting help to manage and administer your foundation

Giving Well sessions include 2 hours of direct consultation as well as pre- and post-meeting support. The first session fee is \$1,000.