



# GIVING WELL SERIES

*Doing Good by Giving Well*

A unique offering of educational and informational services designed to support, enhance and deepen client relationships.  
An opportunity to provide helpful guidance to individuals and families seeking to make the most of their philanthropy and taking their charitable giving to the next level.  
A strategic alliance that is synergistic and mutually reinforcing.

## **Giving Well Philanthropy 101**

An interactive and engaging presentation and dialogue about making the most of your philanthropy

- Choosing the right philanthropic vehicle
- Making the most of a DAF and understanding what you can and can't do
- 3 things you can do to make great grants
- Making philanthropy a family activity

## **Giving Well Conversation Circle**

A facilitated group discussion and learning circle focused on better philanthropy and giving

- Success stories and lessons learned
- Best practices common to successful funders
- New ideas and innovations to improve impact and outcomes

## **Giving Well Family Session**

Custom one-on-one meeting with a philanthropic expert to address specific philanthropic interests, needs, or questions.

- Evaluating alternative giving vehicles based on personal goals and objectives
- Identifying and refining family values and developing a Mission and Giving Plan
- Specific strategies to engage and involve family members
- Crafting a long-term plan for managing and administering a family foundation

*Giving Well* family sessions include 2 hours of direct consultation as well as pre- and post-meeting support. The first session fee is \$500.