

Reflecting on Your Philanthropy and Values

1. What is really important to your family?
2. What are the true assets of your family?
3. What should you do to guide and support the life journey of each family member over time?
4. How wealthy do you want your children to be?
5. Do you feel you have a responsibility to society?

Reflecting on Your Philanthropy and Values Part II

The following questions can serve as a catalyst for you to identify your family's core shared values and the relationship of those values to your charitable giving. *The simplest way to use them is first as a personal reflection exercise, completed by each individual family member. Next, the family comes together to discuss and explore areas of commonality. Much of the benefit of this exercise comes from the shared conversation.*

1. List three influential experiences in your life. How did they shape your core values?
2. List three people (they could be family members, other people you know or historic figures) who have been strong influences on you. What values did they transmit to you?
3. What is important to you and what values guide the choices you make in life? Please list your five top values. (If needed, see attached inventory of values.)
4. How do the values you have identified speak to the kind of giver you want to be?
5. What values did your parents pass on to you? What do you consider your common family-of-origin values?

Family Discussion Guide

Together with other family members, share and discuss your answers to the individual reflection questions, especially 3 and 5. *Identify values or clusters of values that seem to be shared by many in the family. Elaborate on them by sharing family stories illustrating the values.*

1. What are the core family values? What does the family stand for? Narrow down your list to 4-6 core values.
2. How do these values speak to the kind of philanthropy that the family wants to do? The philanthropy that the family wants to be known for?
3. Do they have implications for the kinds of organizations and causes that the family wants to support?
4. Do they have implications for how the family wants to work together in philanthropy?