



This exercise is designed to help you align your values and experiences with your philanthropic vision and legacy goals. It can be completed on your own or as a family.

**Step 1:** Answer the questions below from your individual perspective.

**Articulate Your Values and Vision**

1. What experience most shaped the person I am today?

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2. How has the generosity of others impacted me? Share an example.

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3. What is something I am very proud of?

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4. What is one experience I think everyone should have in their life?

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5. What community, regional or global issue would I most like to solve?

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6. If there were no limits on my ability to give, what would I like to accomplish through my giving?

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**Describe Your Legacy**

1. How would I like to be remembered after my lifetime?

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2. What is the most meaningful charitable gift I've given and why?

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3. What values or lessons do I want to pass on to others?

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**Step 2:** Take time to reflect on your answers to the questions in Step 1. What do they reveal about you, the values you hold dear and how you want to be remembered? If completing as a family, discuss and share your individual answers with each other and record the common areas, if any.

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**Step 3:** Based on your responses to Steps 1 and 2, answer the following questions about what kind of impact you want to make in your community, to the mission of your favorite charities, in the world, etc. Your answers will help identify your priorities for giving now and through your will, trust or other estate plan.

### **Connecting Values and Vision**

**Why** do I give? How do my values influence my giving choices and what I want to accomplish through my giving?

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**What** impact do I want to have? What problems do I want to solve, what changes do I hope to see . . .? Be specific and let your values, passions and imagination guide you. This is your philanthropic vision.

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**Where** do I want to make an impact? Do I want to focus my giving on a particular geographic area, in a particular field, toward a specific passion . . .?

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**Who** do I want to support? Do I want to focus my giving on a particular cause, organization, group of people . . .?

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### **Legacy in Action**

**How** will I make a difference? What are some ways that I will accomplish my giving? For example- help people or organizations meet immediate needs, focus on long-term solutions, volunteer, give to organizations that have impacted you personally, give as a family. Narrow your focus to 3 choices that best match your values, vision and legacy goals.

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*You may find it helpful to look at your total assets as a pie to be divided among your heirs and favorite charities (example: a whole pie is 100% with 25% of the pie allocated to your favorite charity or charities).*

**Should you wish to explore various opportunities at the University of Minnesota** that align with your and your family's values, our planned giving team is available to answer questions and provide information about programs that may be of interest to you. Contact us at 612-624-3333 or 800-775-2187 or email [plgiving@umn.edu](mailto:plgiving@umn.edu). You can also learn more at [driven.umn.edu](http://driven.umn.edu).