



Philanthropic Interest Worksheet

(If desired, send this completed worksheet along with your Donor Application, or use for your own convenience.)

Family Legacy Fund desires to assist you to reach your philanthropic goals and objectives for your Family Foundation. In order to be effective in this assistance, it would be helpful for each donor to complete this Philanthropic Interest Worksheet in the event that no grant recommendation is made to fulfill the required minimum distributions (see Policies and Procedures for details). Family Legacy Fund will then utilize this information to make future grant distributions while keeping the donor's charitable interests in mind.

Personal involvement in philanthropic causes and the grant-making process is highly encouraged. Family Legacy Fund desires to help you create and develop a clear definition of your philanthropic interests. But first, an individual or family philanthropic mission statement is a great springboard from which to define those interests.

Please establish a mission statement that your heirs or others can look to for guidance:

1) Defining Your Philanthropic Mission

Example: The Jones Family Foundation desires to help children with severe physical challenges participate fully in life and pursue its endless possibilities.

My philanthropic mission is...

Do you have general fields of interest you and your family want to support?

2) General Fields of Interest

Example: Childhood cancer research

Are there specific charities you want to support?

3) Specific Charities

4) Fixed Recommendations:

Your future grant distributions will be handled in one of three ways. Please initial the box next to the option that best reflects your wishes.

- I designate the following percentage/s of my family foundation's annual distribution to go to the specific charities listed below.
- I designate the following percentage/s of my family foundation's annual distribution to go to my charitable fields of interest listed below.
- I will make recommendations each year.

5) Charity Interest

Specific Charity or Charitable Field of Interest Distribution

Percentage of Annual Distribution

Specific Charity or Charitable Field of Interest Distribution	Percentage of Annual Distribution

6) Donor Signatures

Donor 1

Signature _____ **Date** ____/____/____

Donor 2

Signature _____ **Date** ____/____/____

Building family foundations to benefit the health and well-being of children
2201 Broadway, Suite 600, Oakland, CA 94612
Tel: 510.428.3362 Fax: 510.654.0728 Email: alee@mail.cho.org Website: familylegacyfund.org