



are you motivated to ‘make a difference’?

Winston Churchill once said ‘**we make a living by what we get; we make a life by what we give**’. Surely there is no better gift in life than giving our own time and energy to a worthy cause. Are you motivated to make a real difference to your community?

This three-step guide will help you to better understand your motives and develop a plan for charitable giving.

step 1: what’s my motivation?

Our motivations for giving can influence the decisions we make as well as the amount of time or money we wish to give. In the table below, rate how strongly each of these motivations is likely to influence you.

my motivation	1	2	3	4	5
I have a personal passion for a particular cause	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I believe I have an obligation to ‘give back’ to society	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I want my life to be meaningful by helping others less fortunate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel peer or family pressure to get involved in giving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My faith or religion is a factor in my need to give	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel an obligation to give	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I want to make the world a better place	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I want to be remembered beyond my own lifetime	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Giving is something my family has always done and I want to continue that tradition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I want to feel better about myself and giving is one way to achieve that	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Take some time to reflect on those motivators that you feel strongly influence your desire to give. Are there any others? These may give clues to the types of giving, or the structures that might best suit your needs.

step 2: what financial support am I giving?

In the table below are several important financial considerations.

Rate each factor in terms of how sure you are about the impact it has on your asset position.

potential impacts on your finances	1	2	3	4	5
I know how much money I can give; either as a one-off donation or as a regular contribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know the period of time over which I expect to give this amount of money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I’m clear about how I’ll donate this money over time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I’m clear about what provisions for charitable giving will be in my will	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I want to keep giving even after I die	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know the types of financial structures available to help preserve my charitable assets, minimise tax and maximise the long term value of my giving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know how to assess the impacts on my donations of time to a particular cause	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I’ll know when the time is right to get involved in charitable activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know how to select the right charitable cause to support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

continued on reverse...



Examine your responses carefully because charitable giving can represent a considerable obligation upon your resources. On the other hand, it can also be a positive and wonderful part of your life.

step 3: what inspires me?

What are you passionate about? Passion is a strong driving force for good and can help us to maintain interest and support over the long term. The following table is designed to help you select those causes that you feel most passionate about. There are two lists; rank your top 10 causes by numbering the ones that most appeal to you in terms of giving. Number '1' should be your most favoured cause.

social causes		humanitarian causes	
~ Social welfare	~ Recreation and sport	~ Disadvantaged people	~ Artists, students or researchers
~ Culture and the arts	~ Community development and housing	~ People with health issues	~ Refugees and asylum seekers
~ Environment	~ Homelessness	~ People with disabilities	~ People affected by wars
~ Religion	~ Civil society, law and legal rights	~ Carers	~ People affected by natural disasters
~ Science	~ Volunteering philanthropy, and not-for-profit organisations	~ Children	~ People affected by starvation
~ Social sciences	~ International development and aid programs	~ Young people	~ Animals, birds, marine life
~ Research and advancing human knowledge		~ Families	~ Gifted people with exceptional skill
~ Health		~ People living in remote communities	
~ Education		~ People living overseas	
~ Animal welfare			

These lists are limited to the mainstream causes but you might have others that appeal to you. By ranking those of highest interest, you will be able to better focus your giving efforts to where it most counts to you. Feel free to combine causes into one area of interest. For example, you may have an interest in assisting children with cancer. The more specific you are the better will be your planning.

making the right choices

It's important to choose the right causes to support, especially given how hard you have worked to be in a position to help and your determination to make a difference. It's equally important to take stock of the financial and legal issues at stake. Setting up appropriate structures can make a big difference to how much of your contributions finally 'hit the mark'.

The best strategy is to get advice from experts. They'll help you make the right choices and, in turn, help you to maximise the value of your contributions to a better world.

For more information see the get connected flyer, or visit www.ipac.com.au/lifedirections.