

Things to consider with your philanthropy...

This checklist may help you see more clearly the impact of your charitable giving in light of the COVID-19 pandemic. Review the items listed here and select those that you plan to put into action.

	1. Revisit the values you want your philanthropy to represent. Have they changed as a result of the COVID-19 pandemic?
	2. Revisit the resources you have available to your philanthropy- time, talent, treasures, networks? Have they changed? Can you give more of one of them now in light of recent changes in your life?
	3. Determine which phase of this journey you want to become involved in? Response phase, Recovery phase, Resilience phase.
	4. Revisit or create your Intentional Giving Plan, that outlines your focus for your giving, your values and the resources and plan for distribution of your giving. Your philanthropic advisor is here to help you.
	5. Reach out to your favorite nonprofit to see how you can assist them in your special area of expertise. This can help fill the gaps while professional staff are triaging the delivery of services to people in need.
	6. Have a financial conversation with the nonprofit organizations you care about. Discuss how they are approaching the financial impact of the pandemic and the potential need to leverage their endowment. Nonprofit organizations want a transparent connection with their key stakeholders
	7. Trust your nonprofit partners. Consider making unrestricted grants now to meet their immediate needs. If you have already made restricted gifts, ask for your advisors guidance to see if you can release those gifts now that circumstances have changed.
	<p>8. If you would like help in clarifying—and articulating—your charitable values and goals, ask your advisor to show you a new tool—<i>A Philanthropic Journey</i> a series of six planning guides:</p> <ul style="list-style-type: none"> • Aligning your giving with your values • Engaging others in your giving • Engaging with nonprofits • Leaving a legacy • Create an intentional giving plan • Create sustainability with your investments

Questions? Please call the Philanthropic Solutions Team toll-free at 855-435-4108, or email us at philanthropicsolutions@wellsfargo.com.