THE EXPLORING SERIES
USER GUIDE

We at 21/64 have assembled *The Exploring Series* to prompt contemplation, clarification, and conversation around giving, wealth, and creating impact. Incorporating three of our most popular tools – *Exploring Giving, Exploring Wealth,* and *Exploring Next Gen Donors* – this set is for a wide range of audiences, including advisors, clients, family members, boards, peers, and colleagues. *The Exploring Series* will inspire and support users as they explore key questions around what giving means to them, their attitudes and behaviors around their financial resources, and the necessary next steps to become the donors they aspire to be. 21/64 has been asking clients about these complicated topics for nearly 20 years, and over that time, we've learned that questions are a powerful tool. Sometimes asking the question is even more important than discovering the answer.

21/64

Ask your never-before-raised questions to learn more about yourself and others.

Gain insight for yourself. Consider action steps based on what you uncover.

Share your own reflections in a safe space. We encourage participants to listen actively and maintain empathy for the feelings of others.

Start a discussion. Each question is designed to prompt an open-minded exploration and a constructive exchange.

If a question seems too challenging or doesn't resonate, move on to another – keep the discovery going, and have fun!

HOW TO USE

1. Review one or more of the *Exploring* decks, depending on your needs.
2. Choose a card from one of the decks that asks a question you feel comfortable discussing.
3. Next, choose a card that you're curious to explore further.
4. Jot down your thoughts so that you can take action on ideas that emerge.
5. If you are using with others, invite each person to share his or her questions and answers.
6. Notice how participants describe their ideas; what might you learn from their thinking?

Debrief the exercise with some of the following questions:

- Which questions were easy or challenging for you, and why?
- Which questions would you like to explore further?
- Based on what you have uncovered, what are your next steps?
- What kind of help would you need to achieve your next steps?

WAYS TO USE → EXPLORING GIVING

- Choose questions from the deck that you would like to ask your family members at your next holiday meal.
- Employ the deck as a team-building exercise to get to know your colleagues.
- Use *Exploring Giving* as an onboarding exercise for boards of directors or giving circle members.

WAYS TO USE → EXPLORING WEALTH

- Utilize the cards to begin or expand upon wealth planning conversations with fund holders, clients, or next gen donors.
- Reflect on the cards to gain a deeper understanding of your own vision for the legacy you want to leave and the implications this might have for your future and that of future generations.
- Lean on the cards as a way to communicate with your spouse or partner about your views on wealth and how this plays out in your lives.

WAYS TO USE → EXPLORING NEXT GEN DONORS

- Highlight a card from the deck that asks a difficult question, and invite peers to discuss how they have addressed this topic.
- Select cards to catalyze an in-depth discussion with your siblings or cousins about what it means to be a donor.
- Use the deck as an icebreaker to get to know people at an event.

NEXT STEPS

- Brand *Exploring Giving, Exploring Wealth,* and *Exploring Next Gen Donors* with your organization's name and logo for corporate events, gifts, or to use with clients.
- Learn more about receiving a discount on bulk orders.
- Check out some of 21/64's other tools that you can use to complement *The Exploring Series* or that can inform other areas of your work.
- Explore 21/64's other capabilities and offerings around facilitating retreats, speaking engagements, professional advisor trainings, and next gen educational offerings.

ABOUT US

21/64 is a non-profit practice specializing in next generation and multigenerational engagement in philanthropy and family enterprise. Founded in 2002, 21/64 was formed to engage the next generation in philanthropy. Over the years, 21/64 has become a preeminent resource for families and their advisors when working to engage the next generation and creating multigenerational systems. A fusion of experiential learning and purposeful skill building, keenly designed with insight about the next generation, is now the hallmark of 21/64 tools and services.

The original version of *Exploring Giving* and both editions of *Exploring Wealth* were co-produced by 21/64 and Relative Solutions. Relative Solutions is a strategic partner with families as they manage change, such as generational transitions in the family enterprise.