

# DATA

How do  
you most  
communicate?

- Family - What is potential for conflict?  
- How often do you talk/meet?  $\leftarrow$   
- Do they plan on adding assets to the trust?  
- How has your family made other group decisions?  
(discuss examples)  
- Will partners be involved (if they exist)

## Charitable interest / past giving

- What nonprofits are you involved in now?
- What issues are important to you?
- What does impact / success mean to you?
- What gift are you most proud of / made you feel good?

## Philanthropic philosophy

- What is your relationship w/ philanthropy so far?
- Who taught you about giving? What did it teach you?
- What role do you like to play in the orgs you support?

# DATA

1. WHAT ARE THEIR Philanthropic interests?
  - > WHAT HAVE YOU GIVEN TO?
  - > WHAT WOULD YOU LIKE TO CHANGE ABOUT YOUR Priorities?
2. WHAT EXCITES YOU ABOUT THIS PROCESS?
  - + WHAT MAKES YOU NERVOUS?
3. WHAT ABOUT PHILANTHROPY IS IMPORTANT TO YOU?
  - > WHAT ASPECT OF THIS HAS BEEN SATISFYING TO YOU?

• HOW DO YOU IMAGINE WORKING TOGETHER?

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CHANGE ABOUT YOUR PRIORITIES?  
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IMPORTANT TO YOU?  
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SATISFYING TO YOU?

- HOW DO YOU IMAGINE  
WORKING TOGETHER?
- HOW MUCH TIME WOULD YOU LIKE  
TO SPEND ON THIS WORK?  
- giving - making decisions  
together, etc.
- HOW DO YOU ALL GET ALONG?  
WHAT HAS BEEN SUCCESSFUL IN THE  
PAST?
- WHAT ROLE DO <sup>you each</sup> IMAGINE PLAYING
- HOW DO YOU LIKE MAKING  
DECISIONS? Past / Future

# Data

What is their timeline?

- When are they interested to start?

- How much involvement of parents?
  - Control (gen 1) (gen 2)

- What's end goal for gen 3?

- What's giving goal?

- What are current values?

- What is philanthropy history?

- What is "Impact"?

- How involved?

- How do you see yourself as a philanthropist?

- What are your expectations?

- What concerns do you have about this process?
  - How can it be easier

- What is the Team Dynamic
  - Sisters to parents

- Sisters to sisters

- Cousins to cousins

- Cousins to cousins

↳ Are there past examples of how the sisters have worked together? How'd they go? - Have there been any persistent challenges?

↳ What's your dynamic with your parents? <sup>(in unms, etc.)</sup>

↳ What has philanthropy meant to your family?

↳ What are the values your parents installed in you?

↳ In 5-10 yrs, what would success look like? / goals e.g., amount

④ How much time do each of you anticipate spending on this (in the near- v. long-term)? Are there others (spouses, kids) who will be involved?

↳ <sup>Timeline</sup> How old are your kids? What's the timeline for <sup>parents to phase out</sup> kids to phase in?

↳ Do you have any early ideas of where you'd like to give?

↳ Where have you/your parents given in the past / how do you feel about those gifts / is there an expectation for continuity?

↳ Where are you in the process re: charitable vehicles?

↳ How <sup>well</sup> do the sisters best connect (same town, Zoom, etc.)?

↳ ~~What~~ How have the sisters been involved in parents' giving to date - what's gone well v. could be improved?

④ ~~What do~~ How do you define "community"? <sup>your</sup>

↳ What, if anything, are you worried about?   
 most excited

# DATA

1. What do you want to get out of this process?
2. Tell us about your experience with giving. (What works/does not work.)
3. What does "giving together" mean? (who makes the decisions)
4. Who is involved? (Who else will be involved? (family tree))
5. Tell us about giving history and current issues in community?

6. What are your expectations around timing both for process and longevity?

7. Tell us about your family dynamics (<sup>you</sup> mention not fighting comment). tell us more