

1. What are your family's core values?
  
2. What are activities in the community that your family participates in regularly that would be tough to replace?
  
3. What organizations do you currently support? List all of them – no matter what kind of support you give (financial, volunteering, mentorship, you sit on their board etc.)
  
4. Out of those organizations, with which ones have you had the most gratifying experiences? What made those experiences special? Do these organizations reflect your family's core values?
  
5. With which ones have you had the least gratifying experiences? What didn't you like about those interactions? Do these organizations reflect your family's core values?

After answering these questions, you should be able to list which organizations take priority in your seasonal giving. Use the form below to allocate your funds.

**This Holiday Season, Our Family has \$ \_\_\_\_\_ to allocate towards Philanthropic Giving.**

Organization	Reason We Are Giving	Amount to Gift

**When you donate to these organizations, let them know why you are doing it!  
They want to hear why you support them.**

**TIP: How to Politely Say “No” when You are Asked to Donate**

If you get overwhelmed with solicitations at the end of the year, don't be afraid to say to organizations, “My family and I have a plan for our giving this year!” or “We have already allocated our philanthropic funds for this year, but would love to learn more about your organization.”

This worksheet is meant to help guide your family through the giving process at the end of the year but can be used whenever you want to evaluate your philanthropic giving.  
Filling this out will help your family stay connected with organizations you are passionate about!