

AN ENDURING LEGACY



THE SEASON OF GIVING

As the year comes to a close, we are reminded of **the power of generosity** — how one thoughtful gift, one charitable contribution, or one act of kindness can create lasting impact.

The holidays offer a unique opportunity to give in ways that honor loved ones, support important causes, and strengthen our connections with family, friends, and community.

This newsletter provides some actionable tips and insights to help your **holiday giving** be **purposeful, strategic, and deeply meaningful**.

GIVING IN HONOR OF OTHERS: A THOUGHTFUL TWIST ON HOLIDAY GIVING



Giving a donation as a gift in someone else's name combines celebration with generosity. It's a way to honor friends, family, or colleagues while supporting causes they care about. Imagine gifting your loved one a chance to plant trees, provide books for children, or fund a local food program — and letting them know they made a tangible difference in someone else's life.

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HOW TO CHOOSE WHERE TO GIVE WHEN EVERYTHING FEELS IMPORTANT

During the holidays, it can feel like every cause is worthy and every organization is asking for support — and in many ways, that's true. But meaningful giving doesn't come from trying to do everything. It comes from deciding what matters most to you.

Here's a simple way to find clarity:

- 1. Start with your values:** Think about what has shaped you this year: an experience, a conversation, something your family has faced, or a need in your community that stood out. Giving in alignment with your values creates a deeper sense of purpose and satisfaction.
- 2. Consider where your gift can make the most aligned impact:** Some donors prefer supporting small, local organizations where contributions go a long way. Others gravitate toward established nonprofits working on broader issues. Both are meaningful. The key is matching your goals with the type of impact you want to be part of.
- 3. Reflect on the legacy you want your generosity to build:** Whether it's modeling generosity for your children, supporting causes connected to your family's story, or simply being intentional with your resources, your giving can reflect the legacy you're creating—one thoughtful choice at a time.

When the options feel overwhelming, return to what you value. Thoughtful giving requires intention, not perfection.

***Action Step:** Sit down with a piece of paper and start by writing down what you're passionate about, what your values are, and the impact you'd like to have. Then search for nonprofits that align with you, not the other way around.*



CREATING A FAMILY GIVING TRADITION

The holiday season offers a natural moment to pause, reflect, and reconnect — and it can also be a beautiful time to weave generosity into your family's traditions.

When families give together, they build a shared sense of purpose rooted in compassion and intention. Talking about causes that matter encourages meaningful conversations and helps each person — from children to grandparents — feel heard and understood. These discussions naturally strengthen connection across generations, opening the door to stories, curiosity, and reflection on what has shaped each of you this year.

A giving tradition also fosters gratitude and perspective. Reflecting on what you have, why you care about certain issues, and how you can make a difference helps cultivate a deeper appreciation for your community and for one another. Over time, these rituals become part of your family's legacy — a meaningful thread that shapes how your family shows up in the world and how future generations understand generosity.

***Action Step:** Set aside a few minutes this season to talk as a family about what giving could look like for you. Create a plan that you'd like to repeat for years to come.*

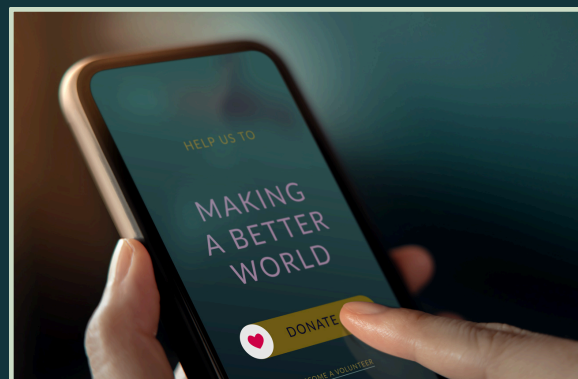
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HOLIDAY GIVING FAQS

- **What is the best way to give during the holidays?**
The “best” way depends on you and your goals. Since there is no “right answer,” I encourage people to reflect on what matters most and choose causes that resonate and are aligned with their values.
- **Are any year-end donations tax deductible?**
Absolutely! Ensure you are giving to a qualified 501(c)3 nonprofit - this information should be on their website - and make a gift with your contact information included by December 31st.
- **Do I need to make a big gift to make a difference?**
Nope! Impact is about intention as much as size. Thoughtful, well-directed gifts, even modest ones, can create lasting change when aligned with meaningful causes.
- **Should I focus on organizations I know well?**
Not necessarily. While familiarity can be helpful, thoughtful giving can also mean supporting new causes or local initiatives that align with your values. What matters most is the impact you’re making.
- **When should I plan my holiday/year-end giving?**
As soon as possible! Planning ahead allows you to reflect on how and where you want to give, as well as time to create a meaningful budget. Keeping your giving from being last-minute and rushed.
- **How can I make my gift more meaningful?**
Connect your gift to what matters most to you. Sometimes that means doing some additional research to find organizations that truly connect with you and your philanthropic goals.

TOP TIPS FOR MEANINGFUL HOLIDAY GIVING

- Align with Your Values
- Give in Honor of Others
- Plan Ahead
- Keep it Personal
- Celebrate Your Generosity
- Reflect on Impact
- Share the Experience
- Give Thoughtfully
- Mix Giving Methods
- Make It a Tradition



HAVE QUESTIONS OR WANT ADDITIONAL
GUIDANCE ON YOUR GIVING STRATEGY?

SCHEDULE YOUR FREE CONSULTATION TODAY.

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PARTNERING WITH A CHARITABLE GIVING CONSULTANT HELPS YOU GIVE THOUGHTFULLY AND STRATEGICALLY, CREATING A LEGACY THAT REPRESENTS YOUR VALUES, INTENTIONS, AND GENEROSITY.