

# PHILANTHROPY PROFILE

## Your gifts, your legacy

As one of our new partners in philanthropy, you join a rich tradition of giving.

With your charitable gifts, you convey your values, beliefs and convictions. Your personal heritage takes on an essential role in enriching and shaping the community we share. You become the change you want to see... for today, and for future generations.

Because every gift you give to the community foundation becomes part of your personal legacy in this community, one of our essential roles is recording your history, your preferences, and your hopes for the future. Please take a few minutes to consider, articulate and share your charitable interests and motivations with us.

Thank you for being part of our rich tradition.



NAME \_\_\_\_\_ DATE OF BIRTH \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ MOBILE \_\_\_\_\_ EMAIL \_\_\_\_\_

SPOUSE NAME \_\_\_\_\_

CHILDREN NAMES \_\_\_\_\_

PARENTS NAMES \_\_\_\_\_

SIBLINGS NAMES \_\_\_\_\_

BUSINESS AFFILIATIONS \_\_\_\_\_

PROFESSIONAL ADVISORS \_\_\_\_\_

CHARITABLE AND FAITH AFFILIATIONS \_\_\_\_\_

ALMA MATER \_\_\_\_\_

HOW DID YOU HEAR ABOUT US? \_\_\_\_\_

WHY DID YOU DECIDE TO GIVE TO US? \_\_\_\_\_

WHO OR WHAT INSPIRED YOUR CHARITABLE VALUES? \_\_\_\_\_

WHAT WOULD YOU LIKE TO BE REMEMBERED FOR? \_\_\_\_\_



*Local giving. Lasting value.*

[www.placercf.org](http://www.placercf.org)

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Please rate the following based on this scale.

higher priority 1 2 3 4 5 lower priority

*Objective.* What I hope to accomplish with my charitable fund.

<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>To support organizations I know and trust (e.g., Red Cross or American Cancer Society)</p> <p>IDENTIFY _____ _____</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>To support causes that matter to me (e.g., adult literacy or performing arts)</p> <p>IDENTIFY _____ _____</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>To effect social change in a field of interest (e.g., education or environment)</p> <p>IDENTIFY _____ _____</p>
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*Interest.* Where I hope to have an impact.

<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>alma mater</p> <p>IDENTIFY _____</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>arts and culture</p> <p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>community development</p> <p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>education</p> <p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>environment</p> <p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>health</p> <p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>human service</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>special interest</p> <p>IDENTIFY _____ _____ _____</p>
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*Motivation.* Why I am motivated to give.

<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>I want to support the organizations that have been important in my life</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>I want to share my good fortune with others who are less fortunate</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>I want to help address social problems</p>
<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>I want to give back to the community that has contributed to my success</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>I want to improve the quality of life in this community</p>	<p style="text-align: center;">1 — 2 — 3 — 4 — 5</p> <p>I want to achieve maximum social impact and change</p>

**An important part of our mission is honoring the legacy of our donors. With your permission, we would like to archive a photograph of your choice as part of your donor file. Whether it's a studio portrait or a favorite snapshot, we may use it in the future to share the story of your life and your gift.**

I'm happy to share a photo for your files.       I'd rather not share a photo at this time.

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_