

# YOUR CHARITABLE OBJECTIVES WORKSHEET

Through a planned gift, you can make a permanent, positive mark on the world. What do you want your mark to be? Jot down a few notes, and let's start a conversation about how we can help you to meet your philanthropic goals.

## HOW DO YOU WANT TO SHAPE THE FUTURE?

What causes ignite great joy, inflame righteous anger, or break your heart?

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What experiences or opportunities have been instrumental in your life?

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What is the best gift you ever made? The worst?

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What charities do you support? Serve as a volunteer?

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What core values do you want continued in your family?

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What legacy do you want to create for yourself and for your family?

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*"Society can only change when there is freedom and education. We enjoy knowing we can continue to invest in improving education, and therefore create a better future."*

**WILLIAM & AUDREY KNOBLACH,**  
Future Society Members



*"The Foundation has been a resource for helping me decide where to give. The knowledge it has accumulated regarding the needs of the community in Fairfield County is impressive. The Foundation will continue my giving after I am no longer here – and I know it will do it well."*

**- JEREMY MAIN**  
Future Society Member



## WHAT IS THE BEST WAY FOR YOU, PERSONALLY, TO GIVE?

When do you want to give: now, at the end of your life, or both?

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How much do you consider an appropriate financial inheritance for your heirs?

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How important is it to mitigate taxes for yourself, and your heirs?

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Do you want to give a fixed dollar amount, a percentage of your estate, or a specific asset?

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Have you made an estate plan? May we review it with you? Meet with your advisors?

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Do you want to leverage your gift by donating to a collective fund?

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Do you want to address the greatest needs as they change over time?

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**Partner with us when you are planning your gift. We can help to ensure that your bequest is truly benefitting your intended purpose.**

**CONTACT NANCY TARTAGLIA AT (203) 750-3212 OR [NTARTAGLIA@FCCFOUNDATION.ORG](mailto:NTARTAGLIA@FCCFOUNDATION.ORG).**