



DAF Perspectives for Advisors

Expertise and tools to help advisors deepen the philanthropic conversation

Philanthropic Planning for the Year Ahead: How to Help Your Clients

By Natalie Pinon, Director of Development

In 2020 donors responded to global events with swift and profound generosity to meet the needs of communities around the world. As we move in to 2021, your clients will continue planning their philanthropic giving for the coming year. Here are some of the ways you can help them make informed decisions about how to organise their giving:

- **Help your clients set philanthropic objectives:** Your clients' goals and objectives will reflect their own personal values, beliefs, motivations and experiences. Think of this as the "why" and the "what" of your clients' philanthropy. Why do they want to give? There often are emotional reasons to want to change something for the better. What causes do they care about? Has one particular issue had a big impact on their life? Helping your clients make a list of the causes they want to support can help clarify their giving goals.
- **Help your clients develop a giving plan:** A successful giving strategy starts with helping your clients to answer some practical questions about their philanthropy. What is their annual giving budget and do they foresee any liquidity events which might help bolster their giving this year? Will the next generation be involved in giving? Which charitable giving vehicle suits their needs best? Do they need a separate charity or can they manage their giving with a [donor-advised fund](#) instead? With these answers your clients can put their giving objectives into action.
- **Help your clients to choose which charities to support:** Even within one cause, your clients may be faced with hundreds of charities to choose from. You might be able to narrow down the choice by helping them think through questions. Does your client want to make a difference locally or globally? Is a charity's size or track record important to them? Do your clients want to donate more than money and dedicate time or skills to the organisations they support?

Charitable giving should be hugely rewarding for your clients. Helping your clients be mindful of philanthropic planning will help them achieve their giving goals and generate long term impact. For more information on how NPT UK can support your clients' philanthropic journey, please [contact us](#).

Natalie Pinon is Director of Development at NPT UK. She has over 15 years of experience working with philanthropists and impact investors to manage their giving

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