

The **WORKBOOK** *for*

**GIVING**

a HANDBOOK *to* HAPPINESS  
*for* THE MODERN PHILANTHROPIST

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*Exercises for identifying the resources, giving goals,  
and giving strategies for you and your family*

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# Contents

Introduction

**Exercise 1:**

What are your motivations and values?

**Exercise 2:**

The simple joy of one-to-one giving

**Exercise 3:**

Narrow your focus areas

**Exercise 4:**

Tackle the nitty gritty

**Exercise 5:**

Make your own giving pledge

# Introduction

Since *Giving: a Handbook to Happiness for the Modern Philanthropist* was first introduced in 2021, the response from philanthropic leaders, community foundations, and individual givers has been tremendous. I have been thrilled to be asked to meet with groups large and small to share more of my own stories and perspectives and, mostly, to inspire more giving by introducing a growing number of readers to the concepts in the book.

One request I've received repeatedly is to offer the chapter exercises from *Giving* in a workbook form. The result is this condensed version to make it even easier to mindfully complete every exercise. In addition to laying out a simple process for identifying the resources, giving goals, and giving strategies for you and your family, I envision this workbook as a resource to help you continue to refine your approach for years and even generations to come.

## **How to use this workbook**

Giving includes five chapters, each with its own set of exercises to help you build on the information in the text. Ultimately, these components will serve as the foundation for your comprehensive giving strategy.

Depending on how you prefer to explore the ideas, you may want to jot down your initial thoughts in the exercise sections of the book itself and then use this format to take your thinking to a deeper level. Or you may want to jump straight to the workbook, saving the exercises in the book to share with your family and friends. As with most every other aspect of giving (aside from taxes!), there are no hard and fast rules. The action you take as a modern philanthropist matters. My goal is simply to offer information and tools to help you become the best giver you can be.

Get ready to change the world—and change your life.

A handwritten signature in black ink, appearing to read "Gordon". The signature is fluid and cursive, with a prominent loop at the end.

# EXERCISE 1

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## **What are your motivations and values?**

Articulating your motivations and values can help you to develop a proactive and effective giving strategy. This can help you direct your time, money, and resources toward the people and causes that matter most to you rather than giving reactively to funding requests. Ultimately, your motivations and values provide the anchor for decision-making at each step of the philanthropy process.

The following two exercises are designed to be completed together.

### **Activity A—Reflect on Your Motivation & Values**

provides reflection questions to help clarify the motivations driving your giving, as well as the values underlying it.

**Activity B—Select Your Values** helps you identify values that are important to you to help guide your giving strategy.

# A

## REFLECT ON YOUR MOTIVATIONS & VALUES

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### Instructions

Review the questions in Activity A to clarify your philanthropic motivations and identify the values important to your giving. Write down your thoughts, taking time to consider each question fully.

What motivates you to give?

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What do you want to change in the world?

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EXERCISE 1

**What life experiences have shaped your desire to give your time or money?**

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**What do you want to sustain or keep the same in the world?**

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**What values are important to your giving?**

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**Where have you given your time and money in the past—and why?**

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**Where do you give your time and money currently—and why?**

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**What issues interest you most—and why?**

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EXERCISE 1

**What issues feel most pressing to you—and why?**

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**What life experiences have shaped you, the way you look at the world, and your approach to giving?**

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**What are some moments or experiences in which you felt like you had some impact on the world?**

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## **B**

### **SELECT YOUR VALUES**

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#### **Instructions: Part 1**

Use the following list to reflect on which values are important to you. You may also write in additional values. For couples and families, you can choose to do this activity together. It can also be helpful to do this activity individually, and then share your responses and discuss areas of overlap and differences.

ACCESSIBILITY

EFFECTIVENESS

ACCOUNTABILITY

EMPATHY

AUTHENTICITY

EMPOWERMENT

COLLABORATION

EQUITY

COMMUNITY

EXPLORATION

CONNECTION

FAIRNESS

COURAGE

FAITH

CREATIVITY

FAMILY

CURIOSITY

FREEDOM

DIGNITY

FUN

DISCIPLINE

GENEROSITY

DIVERSITY

GROWTH

## EXERCISE 1

HAPPINESS

HARMONY

HEALTH

HONOR

HUMILITY

HUMOR

INDEPENDENCE

INNOVATION

INTEGRITY

INTERDEPENDENCE

JOY

JUSTICE

KINDNESS

LEADERSHIP

LOVE

LOYALTY

PASSION

PATRIOTISM

PEACE

PERSISTENCE

RESOURCEFULNESS

RESPECT

SECURITY

SELF-ACTUALIZATION

SERVICE

SIMPLICITY

SPIRITUALITY

SPONTANEITY

STEWARDSHIP

TRADITION

TRUSTWORTHINESS

UNITY

WELLBEING

**Instructions: Part 2**

Write in the five values that resonate the most with you. These are your core values.

1: \_\_\_\_\_

2: \_\_\_\_\_

3: \_\_\_\_\_

4: \_\_\_\_\_

5: \_\_\_\_\_

Now, reflect on how each of these five values might influence your charitable planning and giving decisions.

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## EXERCISE 2

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### **The simple joy of one-to-one giving**

Anyone reading a book on giving is probably already a giver. Maybe you donate to a handful of charities. Perhaps you give regularly to your place of worship. And yet many active philanthropists haven't experienced the simple joy of one-to-one giving.

To give you new insights into how you can experience the personal side of giving, complete the following activities in a single day, taking time to reflect on your experience as soon as possible after the activity is finished.

**Activity C—#BlazeitForward** explores the power of one-to-one giving in the real world.

**Activity D—Reflection** invites you to look closely at your motivation for giving and how to translate your experience into your long-term giving strategy.

# C

## #BlazeitForward

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### Instructions

When you are going about your day, choose a way to pay for a stranger's meal or coffee. Keep it simple and, if possible, make it anonymous.

Write down what you gave, how you chose the recipient of your gift, and your immediate feelings about the experience.

## **D**

### **REFLECT ON YOUR GIVING EXPERIENCE**

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#### **Instructions**

Now take a deeper look at your experience with one-to-one giving and how it might influence how you choose to give in the future. Answer each of the questions below:

What motivated you to give in the manner you did?

Did the dollar amount of the gift impact how you felt about the experience?

**If you were able to give anonymously, did that shift the experience at all?**

**How could you expand on this type of giving on a regular basis?**



## EXERCISE 2

**If you gave in this way again, would you change how you gave?**

**Did you sense any sort of chain reaction or 'ripple effect' from giving?**

**How did this act of giving change your view of yourself? Of the recipient? Of the people around you?**

# EXERCISE 3

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## **Narrow your focus areas**

Exploring your focus areas can make it much easier to sidestep the barriers to giving.

The simplest way to organize your philanthropy is to focus on several specific causes that are personal and important to you, rather than giving across many issues. While your budget can certainly allow room for reactive and emergency giving, narrowing your focus areas for proactive giving can help prioritize your resources.

**Activity E—Look back at your giving history** helps you take stock of your past giving to identify any trends or themes. You can then determine which issues you are most passionate about, assess how you have supported these issues in the past, and decide whether you want to make adjustments in the future.

**Activity F—Select your issues** gives you the opportunity to begin with a clean slate, exploring a range of potential issues to support and then selecting those that align with your values and motivations.

**Activity G—Craft your focus statements** brings it all together to help you identify what issues you want to address most, and the people and places you want to support through giving.

**Activity H—Consider your time, talent & ties** explores areas you may want to support by giving non-financial resources.

## **E**

### **LOOK BACK AT YOUR GIVING & VOLUNTEERING HISTORY**

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#### **Instructions**

If you already have experience giving and volunteering, this exercise will help you identify trends and themes from your past to pinpoint your giving focus. From there, you can understand which issues you are most passionate about, assess how you have supported them, and decide whether you would like to make adjustments. If giving is new in your life—or you simply want to take a completely fresh approach—skip this exercise and move on to exercise F.

**The following reflects my giving history from**

**to**

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**The following reflects my volunteering history from**

**to**

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**Instructions**

**Answer these questions based on your giving and volunteering history:**

**Which organizations did you give to most frequently?**

### EXERCISE 3

**Which organizations received most of your funding?**

**To which organizations did you give the most time?**

**Which organizations do you want to continue to support with your charitable giving?**

**Now that you have identified where you have been giving your money and time, consider if these are the causes you wish to support as you move forward with your philanthropy. Choose five causes that resonate the most with you at this time.**

**1:**

**2:**

**3:**

**4:**

**5:**

**For each of the causes you selected, you may wish to consider focusing on particular populations or geographies. For instance, if you aim to increase access to higher education, you may wish to choose a subset of a population, such as students from low socioeconomic backgrounds in a particular location. If you are unsure about the population or geography, you can add those details later.**

# F

## BEGIN WITH A CLEAN SLATE

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### Instructions

The 'clean slate' approach enables you to identify broader causes or issues that concern you, regardless of your giving and volunteering history.

Select five causes from the list below you want to prioritize in your giving. If you want to give to causes not listed here, simply add your own.

ANIMAL PROTECTION & WELFARE

ARTS & CULTURE

CHILDREN & YOUTH SERVICES

CIVIL RIGHTS & ADVOCACY

CLIMATE CHANGE

CRIME PREVENTION

CRIMINAL JUSTICE REFORM

DISASTER PREPAREDNESS & RELIEF

EDUCATION

ENVIRONMENT

EQUALITY

FAMILY SERVICES & ASSISTANCE

FOOD & NUTRITION

HEALTH

HOUSING & HOMELESSNESS

HUMAN RIGHTS

INTERNATIONAL PEACE & SECURITY

LABOR UNIONS  
LAW ENFORCEMENT  
MEDICAL RESEARCH  
MENTAL HEALTH  
RACIAL JUSTICE  
RECYCLING  
POLLUTION  
RELIGION  
SOCIAL SERVICES  
VOTER EDUCATION & REGISTRATION  
WILDLIFE PRESERVATION & PROTECTION  
WOMEN'S RIGHTS

**1:**

**2:**

**3:**

**4:**

**5:**



For each of the causes you selected, consider focusing on particular populations or geographies. For instance, if you aim to increase access to higher education, you may wish to choose a subset of a population, such as students from low socioeconomic backgrounds in a particular location. If you are unsure about the population or geography, you can add those details later.

## **G**

### **CRAFT YOUR FOCUS STATEMENT**

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#### **Instructions**

A focus statement connects your values, motivations, and cause areas in a statement of philanthropic intent. A strong focus statement will help guide your charitable giving, especially in the face of competing demands. We recommend creating a separate focus statement for each cause you want to support.

#### **Focus statement example**

“I want to address education inequality for low-income secondary school students in the Los Angeles public schools because this aligns with my commitment to equity in public education.”

### **Components of a focus statement**

I want to address [What] for [Who] [Where]  
because this aligns with my commitment to  
[Which values].

Create focus statements for the five causes  
you selected:

#### **Focus statement 1:**

I want to address

for

because this aligns with my commitment to

.

#### **Focus statement 2:**

I want to address

for

because this aligns with my commitment to

.

EXERCISE 3

**Focus statement 3:**

I want to address

for

because this aligns with my commitment to

.

**Focus statement 4:**

I want to address

for

because this aligns with my commitment to

.

**Focus statement 5:**

I want to address

for

because this aligns with my commitment to

.

# H

## CONSIDER YOUR TIME, TALENT & TIES

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Financial ‘treasure’ is just one form of giving. You may also choose to give non-financial resources such as your time, talent, or ties. Volunteering can be an excellent way to learn more about your focus areas and get to know a particular organization. Many nonprofits post volunteer positions on their websites. It is common for organizations to announce a need for short-term commitments focused around a specific event or short-term business goal, as well as longer-term commitments connected to a series of events, an ongoing program, or extended strategic initiatives.

Another way to contribute at a leadership level is to serve on the board of a nonprofit organization. Board candidates are often selected based on the skills and expertise they can contribute. Board members may also be asked to serve as ‘ambassadors’ for the organization, tapping into their ‘ties’—their social and professional networks—to help raise funds or other assistance. While board service can be very meaningful, it can also be a significant time commitment, depending on the needs of the organization and the skills and resources you and other board members bring to the table.

## EXERCISE 3

### **Instructions**

**Review the questions below to consider your interest in contributing your time, talent, and ties to a particular focus area. Write down your thoughts.**

**Is there an organization you would like to learn about through firsthand experience?**

**Is there a cause or organization that might benefit from your unique skills or experience?**

**If you have a particular organization in mind, is that organization currently accepting volunteers? What responsibilities do volunteers have?**

**How much time do you want to commit to an organization? Is that aligned with the organization's structure and requirements?**

### **Instructions**

If you are interested in exploring serving on the board of an organization, consider these questions and write down your thoughts:

#### **Do you have enough time for board service?**

Serving as a board member requires more than attending meetings. You will often be expected to serve on one or more committees, read and understand financial documents, represent the organization at various events, and assist with fundraising.

**Are you willing and able to meet fundraising expectations?**

Board members are usually asked to make personal contributions as well as raise funds from their personal and professional networks. You may also be asked to network with potential donors on behalf of the organization.

**What skills or expertise do you offer? Are your skills or expertise needed by the organization's board?**

Board members offer a variety of skills and expertise to assist with the overall functions of the board and the organization. How you can make a difference in the organization depends on aligning what you offer with the organization's current needs.



**How might you tap into your personal and professional networks to assist the organization in meeting its goals?**

In addition to reaching out to friends and colleagues for fundraising parties or other special events, board members also often tap into their networks to seek advice and mobilize additional skill sets to assist with special projects and initiatives. Considering the organizations and causes in which you have a particular interest, who in your network comes to mind as a potential advocate? How might they be able to help support the goals of the organization?

# EXERCISE 4

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## Tackle the nitty gritty

Your giving budget and the tools you choose to support your giving strategy will both influence the level of impact you are able to create. The following exercises are designed to help you begin to develop a concrete giving strategy and choose the tools that are best suited to your goals.

**Activity I—Determine your giving budget** to be sure your philanthropy is supported by and integrated with your overall wealth management plan.

**Activity J—Select giving tools** that are aligned with your needs, goals, and giving strategy.

## I DETERMINE YOUR GIVING BUDGET

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It is a personal decision to determine how much to give to your focus areas compared to reserving resources for you and your family's present and future needs. This exercise will help you determine your charitable giving budget for the next three

years. The goal is to focus on proactive giving in the focus areas you identified in Chapter 3. The first step is to categorize and distribute your contributions into three buckets:

1. **Proactive giving** includes contributions to organizations working on your selected causes.
2. **Reactive giving** includes contributions to personal requests from family and friends to support their selected causes.
3. **Emergency giving** includes contributions to disaster and emergency relief funds, or dire situations that emerge from unexpected policy changes.

### **Instructions: Part 1**

Answer the following questions to explore how much you want your giving budget to be, and how you want to allocate your budget to each giving category. You may want to involve your financial advisor in the discussion to ensure your strategy is aligned with your overall financial plan. Note that you may choose to skip questions that aren't relevant to you.

**How much do you wish to allocate to giving in the next year? Over the next three years?**

**What future financial situations or developments could affect how much you allocate to giving?**

## EXERCISE 4

**What are the potential tax considerations for your different time horizons?**

**Given your current financial circumstances, could you think about allocating more?**

**Are you in a position to consider giving appreciated assets as part of your giving plan?**

**How have you thought about allocating assets for the next generation?**

EXERCISE 4

**Would you like to revisit your allocation in the future? If so, when?**

**How much are you setting aside as your total giving budget for the next 3 years?**

**Instructions: Part 2**

The next step is to determine how you would like to allocate your total giving budget across the three categories: proactive, reactive, and emergency giving. Use the chart below to indicate your allocations. Adjust each amount until the distribution feels right to you.

Total Giving Budget	3-Year Budget	Year 1	Year 2	Year 3
	\$ Amnt. %	\$ Amnt. %	\$ Amnt. %	\$ Amnt. %
<b>Proactive Giving</b> includes contributions to organizations working on your selected causes				
<b>Reactive Giving</b> includes contributions to personal requests from family and friends to support their selected causes				
<b>Emergency Giving</b> includes contributions to disaster and emergency relief funds, or dire situations that emerge from unexpected policy changes				



# **J**

## **SELECT YOUR GIVING TOOLS**

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Philanthropic vehicles—or giving tools—provide a structure for you to carry out your giving plan. This exercise will help you identify which giving tools are best suited to your personal, financial, and philanthropic preferences. Keep in mind that you can achieve your giving objectives through any vehicle. The goal here is to ensure that you select the vehicle or combination of vehicles that best aligns with your broader needs.

### **Instructions**

Review the list of considerations below and write down your thoughts. This list is not intended to be exhaustive, but rather to spur deeper thinking to help drive your decisions. It is highly recommended that you work with your financial advisor to ensure the giving vehicles you choose are the best available to address your giving budget, preferences, and goals.

**Anonymity:** Do you prefer to give anonymously, or do you prefer your giving to be public?

**Control:** Do you want to retain total control over granting decisions?

**Distribution:** Would you want a vehicle with an annual distribution requirement in place to keep your giving in action?

## EXERCISE 4

**Family involvement:** Do you want your family members involved in giving decisions?

**Locale:** Do you want your giving to support your local community? Are international issues a priority?

**Impact investments:** Do you want to make investments that generate both social and financial return, such as requiring ESG (environmental, social, and governance) criteria to screen potential investments?

**Timing & perpetuity:** Do you prefer to give while you are living, after your death, or both? Do you want the structure of your giving to exist in perpetuity?

**Political contributions:** Do you want to make political donations and engage in lobbying? Direct political contributions are not tax-deductible, though some lobbying and advocacy can be, depending on a number of factors. Seek further professional advice if politics is a priority issue for you.

**Public disclosure:** Are you willing to submit separate tax records that make a record of your giving available to the public?

## EXERCISE 4

**Tax implications:** Are tax implications important to your choice of vehicle?

**Growth potential:** Are you seeking to create a philanthropic investment that increases over time?

**Administrative support:** Are you willing and able to invest your time and effort on an ongoing basis and hire paid staff for your vehicle?

**Ranking:** Of the considerations listed above, list the three that are most important to you. These will help drive your selections and choose the most appropriate giving tools for you.

1:

2:

3:

# EXERCISE 5

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## SET THE STAGE FOR A GIVING MOVEMENT

You don't need to be a celebrity or billionaire to create your own giving movement.

**Activity K—Involve your family** to build enthusiasm around your own giving and inspire multiple generations of modern philanthropists.

**Activity L—Make a giving pledge** that reflects your own desires as a modern philanthropist.

## **K** INVOLVE YOUR FAMILY

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Charitable giving presents an opportunity to involve your family in one of life's most fulfilling activities: giving back. You can engage family members in philanthropy in many ways, including asking them to advise or assist you in developing philanthropic goals, creating and implementing a giving strategy, launching family members on their own giving trajectory, and more. Who is included in your family is entirely up to you. Involving your family can take multiple forms, from involving them in decision-making to preparing for eventual succession.

**Instructions: Part 1**

Review the following questions and write down your thoughts. You don't have to answer all of the questions, but it is recommended that you consider each one carefully before reaching out to family members.

What motivates you to involve your family in your charitable giving?

What obstacles could arise from involving your family in your charitable giving plans?



## EXERCISE 5

**Is your giving a continuation of your family's legacy or something you are starting?**

**What values do you want to ensure get translated through your shared giving?**

**Are you looking to engage your family in an ongoing way with all decision making, or do you want your family members to help carry out your vision and decisions?**

**Are there giving decisions for which you want others to have full discretion?**

## EXERCISE 5

**Are there giving decisions that you would like to make collaboratively? If yes, how would you like these decisions to be made (e.g., by majority vote)?**

**Which family members do you want to engage in your charitable giving? (List them here, and you can determine specific roles in the next activity.)**

**Will some family members be upset if you do not include them? How might you communicate your decision to them?**

**Instructions: Part 2**

Philanthropy is an opportunity to bring your family together around a common goal, communicate values across generations, and develop a sense of social responsibility in the next generation. Below are three suggested activities to introduce the next generation to giving.

**Start a conversation about giving with younger family members.** Share your reasons for giving, including personal stories whenever possible. Invite their feedback. Ask what causes are important to them and how they would choose to give if they were empowered to make their own giving decisions. Reflect on the conversation below.

**Host a family dinner or meeting with the next generation to discuss charitable giving. One way to begin the discussion might be to engage with an exploration of the causes that are most important to each person using the exercises in this book. Ask each person to identify their top cause and write it down below, as well as any new ideas or insights from your time together that may impact your own giving strategy.**

# **L(ast)**

## **MAKE A GIVING PLEDGE**

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Warren Buffet, Bill Gates, and Melinda French Gates created The Giving Pledge to encourage the wealthiest people in the world to dedicate the majority of their wealth to giving back. My own dream is to see this idea spread to include anyone and everyone who has the capacity to give to others—the non-billionaires and non-millionaires who may not have acquired massive wealth, but who still have so much to give. A giving pledge for the modern philanthropist.

### **Instructions**

Create your pledge today by writing down your answers to the following questions:

Why do you want to give?

**What, where, and when do you plan to give (use the exercises in this book to guide you)?**

**How do you plan to give (include the giving tools that best support your strategy)?**



## EXERCISE 5

**Once you have written your pledge, talk to a financial advisor, Community Foundation representative, or other experienced giver to create a concrete giving strategy based on your resources and giving goals.**

**The action you take as a modern philanthropist matters.**

**Get ready to change the world—and change your life.**

