

Taking the next step, no matter the size, can ignite meaningful change. intentional giving, we create waves of kindness and purpose that ripple out, touching lives known and unknown.

CREATE A GIVING PLAN

Thank you for participating in our SWELL Gathering, exchanging ideas about women's generosity. As women, we give in many vital ways, with our Time, with our Talent, and with our Treasure. As volunteers, the value of our time and talent is incredible and immeasurable. We can, are, and should be proud of our accomplishments.

SWELL is meant to address the third T of giving, Treasure! When we believe in a cause enough to give our time and talent, giving financially will amplify our belief. There are additional causes where our money is the best or only way to support something we value.

This guide is intended to help you continue thinking about your own personal financial giving and your system for deepening your impact.

We all Give...

Whether by plan or not.

Regardless of age

Regardless of stage of giving

Regardless of amount of personal wealth.

SWELL is about creating a process for being intentional and effective when donating your money. Whether you are just beginning your philanthropy, already have a routine for donating, or have the ability to give substantial gifts, creating a regular system for thoughtful review will make your donating more meaningful.



THE GOAL of this guide is to...

Think about your motivations.

- ～ Consider the variety and kinds of recipients you want to help,
- ～ Evaluate your level of concern about the causes on your list,
- ～ Research recipients to determine if your money will be used as you want,
- ～ Determine appropriate amounts for allocations,
- ～ Set up a plan for recording, analyzing, and evaluating your giving.

The ultimate goal is that you will find ways to stretch and be more significant in your financial giving. As the donations to individual causes grow, the whole world will benefit. As you continually evaluate your interests, concerns, and passions, you will probably find your choices and decisions shifting.

You have just participated in a SWELL gathering, exchanging ideas about effective personal financial giving. There are a number of ways you can make the ideas of SWELL grow.

REFLECT on the thoughts exchanged.

REREAD the **SWELL** guest Handbook from your gathering.

Think about each of the subjects; which do you already do or believe, and which might be new and appropriately useful.

BEGIN Your Personal Process.

REVIEW your history of financial giving; recipients, amounts and totals.

CATEGORIZE the levels of causes, organizations, and purposes; including family, spontaneous, community, national and worldwide needs.

EVALUATE how you feel about your donations and desires, and what changes you might like to make.



CONSIDER CAUSES that align with your beliefs.

When you explore the issues and causes that matter to you on different levels, you will see the threads of your own purpose weaving together with those of the various needs of the world.

Financial giving can move forward any number of purposes and include a wide variety of destinations – individuals, charities, non-profits, events, ideas, institutions, organizations, causes.

This will be an opportunity to be more thoughtful and impactful in an ever-expanding wave of goodness in the world.

Notes :



If you haven't already done this, set up a process for your financial giving.

Include :

An ongoing record of your donations and gifts with destinations, addresses, amounts, dates, and how donated (on line, check, cash, etc)

A place to gather information about causes to which you have given: Those that intrigue you as potential recipients. Those to whom you feel you "should" consider. Those about which you really feel passionate.

A time to evaluate your current giving.

Check for alignment in your choice of causes, amounts of donations, and how well they match your intentions and beliefs.

A plan to learn more about the people, causes, and organizations listed, to know their full story, to find specifics that match your concerns, to vet, to be current, and to think about the future.

A times to review your history, current concerns, future wishes, and realities of your giving plan.

A special times to consider which items go in plans while you are alive, after you die, and both.

CONTINUE. PLANT SEEDS...

Talk about the ideas of generosity with family,
spouse, partner, kids and friends.

Invite a small gathering of your friends and acquaintances
to a SWELL gathering of your own.

SWELLgatherings.com

has a Host Guide and materials to help you.

Be part of making SWELL grow... from a Wave to a Tsunami.