How to Identify the Philanthropic Client

WHAT ARE THE CHARACTERISTICS OF PHILANTHROPISTS? DO YOUR CLIENTS SHARE THESE CHARACTERISTICS?

Here's a simple checklist to help you identify a new or prospective Philanthropic Client. Does your client,

1.	Volunteer in the community?	☐ YES	☐ NO
2.	Belong to a church or another religious organization?	☐ YES	☐ NO
3.	Participate actively in local politics?	☐ YES	☐ NO
4.	Believe strongly in social issues?	☐ YES	☐ NO
5.	Believe in long-term planning? And setting goals?	☐ YES	☐ NO
6.	Give to charities?	☐ YES	☐ NO
7.	Plan to give more to charities?	☐ YES	☐ NO
8.	Believe in "giving back"?	☐ YES	☐ NO
9.	Want to leave a legacy?	☐ YES	☐ NO
10.	Face a significant liquidity event (*for example, business sale, stock options, retirement or severance package, inheritance, lottery win, repatriating international pension assets*)?	☐ YES	☐ NO
11.	Face material tax liabilities?	☐ YES	☐ NO
12.	Plan to review their will?	☐ YES	☐ NO
13.	Look forward to a 50th birthday or older?	☐ YES	☐ NO
14.	Have adult children or no children?	☐ YES	☐ NO

If the answers to most of the questions are YES, your client may fit the profile of a Philanthropic Client. Depending on the materiality of their assets and current charitable contributions, your client may be a prospect for opening a (DAF) Foundation account and developing a long-term plan for charitable gift giving.

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