

Self-Assessment

How I feel about my giving and investing is:

The best part of my or our giving or investing is:

On a scale of 1-10 (10 being I am really up to date) I would rate my current legacy planning as a #_____.

Places I need support or improvement or what I/we need is:

How I feel about the amount I or we give or invest annually is:

What I would like to change about my or our giving or investing is:

An issue I'd like to know more about regarding social investing or giving is:

I could use some support or guidance about annual, multi-year or legacy giving or planning Y N (circle)

I would like more information about aligning my values and my retirement, my legacy or other investment? Y N (circle)

My plan to make progress is: