

PhilanthropyMatters

We Share Your Passion!

January 2017

Dear Colleagues:

I wanted to share with you highlights of two reports that I feel may help you in your planning as well as possible discussion opportunities with your boards.

One represents trends in philanthropy that are being considered for 2017. The other provides a summary from a very interesting study (the 2016 US Trust Study of High Net Worth Philanthropy) that reflects philanthropic interests of potential major donors to your organizations.

On Philanthropy:

Seven trends to expect in 2017*

1. Reduced tax incentives for giving
2. Increased impact investing (foundation capital to be invested for both financial return and social impact)
3. **More contributions from fewer, wealthier donors**
4. Support of constitutional principles
5. Increasing impact of women
6. More donors of color
7. Mainstreaming of philanthropic strategy (a strategic investment that transforms both society and the donor)

* <http://www.denverpost.com/2017/01/08/seven-trends-in-philanthropy-2017/>

** http://www.ustrust.com/publish/content/application/pdf/GWMOL/USTp_ARVF5NJD_2017_11.pdf

2016 US Trust Study of High Net Worth Philanthropy**

Two immediate takeaways:

The number of causes supported annually varies by age.

The latest report sheds light upon just how many charities are supported on the average. See the results below:

- Under Age 50 – 5 Organizations Supported
- Age 50-70 – 7 Organizations Supported
- Over 70 – 11 Organizations Supported

Volunteering Leads to Higher Level of Giving

- Those who volunteer give 56% more than those who don't
- 49% give to every charity they volunteer with
- 97% of those under 50 plan to volunteer more in the future
- 92% of those 50 and over plan to volunteer more in the future

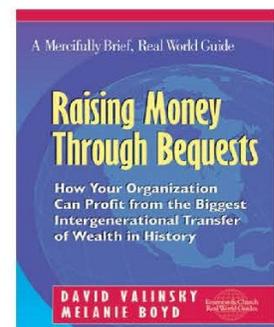
— Bloomerang Blog

Major Gift Planning & Coaching

- What to ask
- How to ask
- Who to ask
- When to ask
- Building a relationship

Four Months of "Pre" Pre-Campaign Planning

- Developing your prospect list
- Key points for a campaign case
- Early advice visits



David Valinsky Associates LLC
614.238.3390 / www.davidvalinsky.com

