



6 Simple Steps to Get Started

Are you ready to create a personalized giving plan that's right for you and your family?

These steps can help you get started.

- 1. Think about your goals:**
What do you want your giving to accomplish? Discuss these objectives with your family and financial advisors. You can start by answering the questions in *Begin Your Philanthropic Plan* included in this packet. Our staff has years of experience in helping people craft or clarify their philanthropic vision and can join you in these conversations, if you choose.
- 2. Consider your giving options:**
Compare and contrast the various charitable giving options to determine your best gift. If you are considering a private foundation, one way to start is by reviewing the table entitled *Comparing Donor-Advised Funds, Private Foundations and Supporting Organizations* included in this packet.
- 3. Consider when to give:**
Based on your situation, it might be best for you to establish a fund now or later in your life, make a bequest in your will, or a combination of all. We can help you determine the approach that will best meet your goals and needs, now and as your circumstances change.
- 4. Decide what causes you want to support:**
Choose to support specific organizations, the community's greatest needs as they change over time, or focus on issues that you care about. And, because the Foundation's grantmaking is focused in Greater Hartford, we understand the various nonprofit organizations in our area. If you wish, the Foundation can suggest organizations that might be a good fit for giving in your areas of interest.
- 5. Decide what to give:**
You can give a number of different types of assets to start or build your fund at the Hartford Foundation. Options include cash, securities, real estate or other types of property.
- 6. Work with us to develop your plan:**
The Hartford Foundation administers a number of different types of funds and giving circles. By working with our experienced staff, you can develop a flexible plan to help you meet your philanthropic goals.