# 15 Questions to Ask Clients About Their Charitable Giving

by Ken Nopar

Though each client situation may be a bit different, some of the questions that advisors can ask clients to determine the best path forward include:

1. Are you involved with any charities now as a board member, donor or volunteer?
2. Looking forward, do you feel that you will become more or less involved or change the amount that you will donate to charities?
3. Did the 2017 tax law change the way or how much you give?
4. Do you prefer to give during your lifetime, at death, or for many years after death? If after death, who will make the decisions?
5. Do you anticipate leaving any bequests to charities or to a charitable vehicle? Are you planning on making donations from your retirement accounts during your lifetime or upon death?
6. Who is involved in making the charitable giving decisions? Have you included your children or others or do you plan on doing so?
7. Is a charitable legacy important to you, and would you want your children or others to continue giving in the future?
8. How do you feel after making donations? Do you always feel satisfied and pleased or are there any frustrations with the giving process?
9. How do you decide how much to give each year?
10. How do you decide which charities to support?
11. Do you donate throughout the year or is there a rush to give at the end of the year?
12. Which types of assets do you typically donate each year? Do you have any assets that you are looking to sell or that nobody in the family is interested in receiving?
13. Have you established any charitable vehicles such as a private foundation or donor-advised fund (DAF)? Did you set these up recently? Are these working well for you or do you have any concerns with them? How are these assets invested?
14. Do you prefer to give publicly or anonymously? To big organizations or small? To many charities or just a few?
15. Do you have confidence in knowing that your donations are having an impact?

<https://www.thinkadvisor.com/2019/08/21/15-questions-to-ask-clients-about-their-charitable-giving/?slreturn=20220017195659>

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