



## Creating a Granting Strategy

Your Schwab Charitable Donor-Advised Fund Account



Increase your giving by building a charitable strategy using these five guidelines.

### 1. Develop a purposeful strategy for giving.

- Take a step back and think about what you want to achieve with your charitable dollars.
- Identify specific, measurable goals before making grants. In addition to reflecting your values, having clear goals can also help you to say no to solicitations that do not help achieve your desired outcomes.
- Check your progress against the strategy throughout the year and beyond. Your Schwab Charitable account online summary can help by displaying grant history by cause, so that your activity can be monitored and you can ensure that it is consistent with your giving plans.

### 2. Choose the organizations to support.

- Support one or many causes from your Schwab Charitable account.
- Determine who should decide which causes to support, and how many. It might be a decision you make on your own, or it can be a wonderful thing to do together as a family.
- If international causes are important to you, Schwab Charitable offers simple, flexible, tax-smart solutions to meet your needs, including the ability to give directly to international charities.
- Use Guidestar on Schwab Charitable Client Center to determine which organizations to support. Visit or contact the organizations you are considering, and ask questions to inform your decision.
- Monitor the effectiveness of your giving and consider new opportunities that may be a better fit for your goals.

## Kind words from our donors<sup>1</sup>

“It’s a superb way to manage our charitable giving—and has, in fact, increased our level of philanthropy.”

“We used this as a way of teaching our grandchildren about philanthropy by having them research different grant recipients.”

“Our Schwab Charitable account makes giving much easier and more convenient. We can contribute to our account and then grant to charities when it makes the most sense.”

### 3. Decide on grant timing and amounts.

- Recommend grants of \$50 or more at any time from your Schwab Charitable account to any IRS-approved 501(c)(3) public charity.
- Consider whether the causes you are supporting are likely to benefit most from a one-time grant at a certain time of the year, or a series of gifts throughout the year.

### 4. Choose your desired level of recognition.

- Determine whether you want to be recognized for your charitable gift or want to give anonymously.
- Grants from your Schwab Charitable account are accompanied by a letter that can be customized to the level of recognition you prefer.

### 5. Consider the long-term.

- Share your philanthropic values with your family by naming them as successors on your Schwab Charitable account.
- Extend your charitable giving beyond your lifetime through the [Schwab Charitable Legacy Program](#). Used in conjunction with a holistic estate plan, this program gives you the flexibility to provide charitable organizations with support over time after your death.

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## To learn more

- Contact your advisor or financial professional.
- Visit [schwabcharitable.org](http://schwabcharitable.org)

<sup>1</sup> These testimonials may not be representative of the experiences of other clients. These are not indicative of future performance or success. Schwab Charitable does not provide specific individualized tax, legal, or investment planning advice. Where specific advice is necessary or appropriate, please consult with a qualified attorney, tax advisor or CPA.

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