



One-time Packages

G1 Personal Giving Strategy (\$3,000) or (\$2,500 with quarterly offering or higher)

Meet with individual or couple to develop strategic Giving plan.

Includes 3 sessions, each approximately 2-3 hours.

1. Story and Values
2. Go over the past and looking to the future
 - Giving history
 - Estate and Assets
 - Higher vision for giving generously
3. Comparing notes and setting the course
 - Non-profits in your zone
 - Getting involved, The world needs champions
 - The plan, joy of action

G2 Generosity Package (\$5,000)

Meet with teen children or older to develop their own heart for generosity.

Consists of one family meeting and three sessions with each child.

- Multiple models available, depends how the family wants to proceed in handling philanthropy. To be decided before starting the process.
- Suggest giving a budget for the kids to give away.

Monthly Retainer Options

Quarterly Offering (250/month)

Your advocate with check-ins quarterly over lunch, coffee, or the phone to go over giving strategy and where that has taken you. The focus will be encouragement on your road to increasing generosity. Will follow up on one or two organizations if desired. Can help make course corrections and revisions to your giving strategy. Available for creative problem-solving regarding your philanthropy needs. Will present giving opportunity portfolio after the Strategic Planning phase. Will utilize a full network to help you to meet your goals.

Monthly Offering (1,000/month)

Will check in person or by phone monthly. Available to attend ministry meetings on your behalf or with you. Can set up the appointments to make sure we are carrying out the strategic giving plan. A fiduciary for keeping the strategic giving plan accountable. Vetting and due diligence for non-profits in target giving range when requested. Will utilize full network to help you meet your goals by personally setting up meetings. Can set up lunch with Steve Perry of the Segerstrom fame, author of, "Living With Wealth Without Losing your Soul," to hear about his philanthropic journey. Will do a Journey of Generosity workshop to your network once a year.

Small Family Office (3,500/month)

Will act as a gatekeeper for all ministries and financial asks. Follow up on all gifts with half year reports available on all known giving. Quarterback appropriate due-diligence and vetting on ministries including traveling to foreign lands (extra cost and all travel included). Organize vision trips for your family to see the work you have funded. Will be able to attend fundraisers for you or with you, and keep you up to date on all ministry movements. Will work with appropriate counterparts to maximize your giving from your assets. This includes setting up matching funds, taking advantage of matching funds and working with donor advised funds and market managers. Will help organize gatherings to encourage your friends to give. Will guard your vision for your family legacy goals.