

Giving with Purpose: Guiding Clients to Align Their Values, Passions and Philanthropy

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WHO IS COMMUNITIES FOUNDATION OF TEXAS?

BUILDING THRIVING COMMUNITIES FOR **ALL**

OUR MISSION

To improve the lives of all people in our community by investing in their health, wealth, living and learning.

We accomplish this by **growing**
community giving, expanding
community impact and advancing
community equity.



CFT's IMPACT BY THE NUMBERS

Total Charitable Assets:

\$1.7 billion

Cumulative Grants:

\$3 billion+ (\$218M in FY2025)

Number of Charitable Funds: 1,400+

North Texas Giving Day

\$700+ million in impact in 17 years

In 2025, raised over \$78 million for over 3,500 nonprofits

What we'll accomplish today

- Learn what **GiveWisely®** is and how it can be helpful in your work
- **Engage with two key GiveWisely® tools** and learn how to easily incorporate them into conversations with your clients
- **Learn about additional resources** you can provide to help deepen your client's understanding of their philanthropic goals and how you can help them

What is GiveWisely®?



CFT has found that our fundholders want to:

- **Stop being reactive** and start being more strategic in their charitable giving
- **Effectively share why** they give with loved ones, and to help instill in them their own desire to give back
- **Stop feeling guilty** when they have to say “no”
- Have a simple way to bring **more focus and meaning** to the gifts they give

Just a few GiveWisely® topics

- **Finding Your Nonprofit Match-** Understanding community needs and assessing nonprofits to be able to choose which nonprofit is right for you
- **Charitable Budgeting-** Considering the factors that define your giving budget, and learning how to pro-actively plan your giving and align it with your giving focus
- **Sharing Your Passions-** Considering the family, friends and nonprofits in your life who would benefit from a better understanding of what motivates you charitably
- **Beyond the Class: Maintaining Focus and Impact in Your Giving-** Creating a simple plan to move forward with what you've learned
- **Bringing those you love along for the journey-** CFT works with individuals, couples, families and multiple generations- as well as businesses and nonprofits

How is giving back important to your clients?



In what way is philanthropy important to them- **or is it?**

And how can you easily start that conversation?

Identifying your Values

What are the Values that most motivate you in your day-to-day life?

Take 3-5 minutes to review and select the **top 3 values** that resonate most with you.



Defining your Passions

What things in general are you most passionate about in life?

Take 5 minutes to review and select the **top 3 images** that resonate most with you.

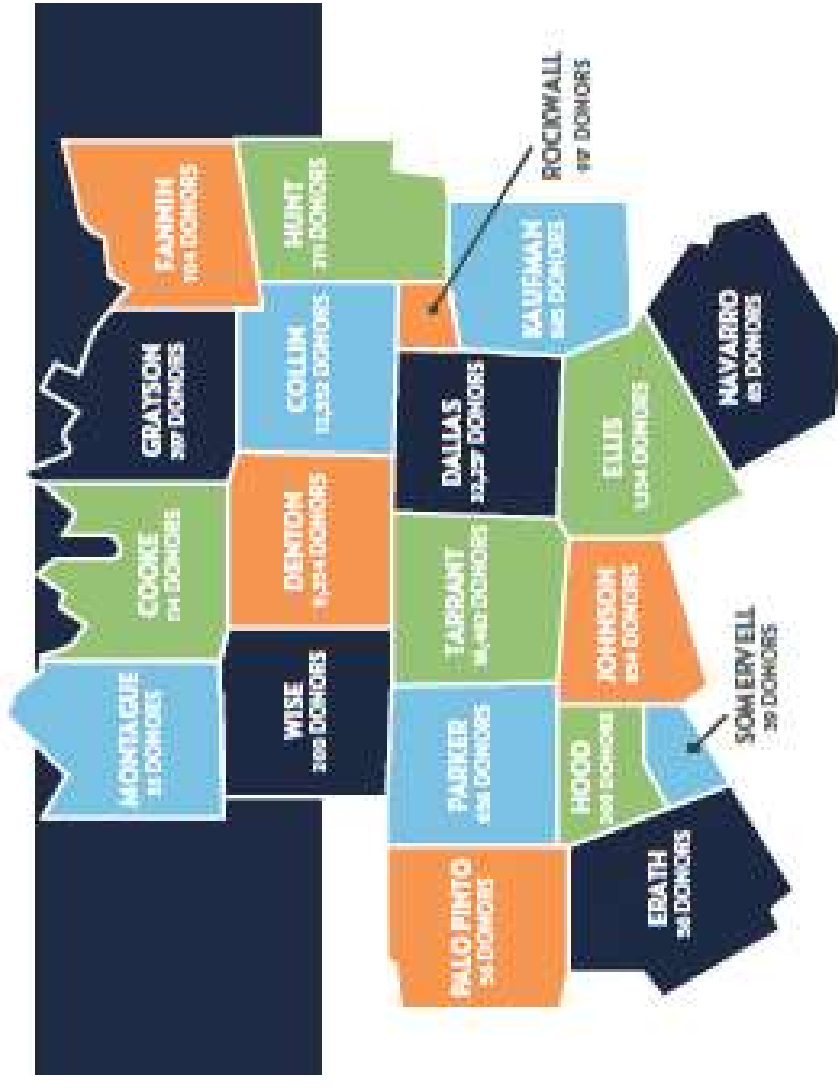


Ways you can use GiveWisely® tools

- Annual planning review
- As part of the agenda for a family meeting
- Discussion of charitable budgeting
- Incorporate in new client questionnaire

Clarity = Confidence

How many nonprofits are
operating in North Texas?
(20-county area)



Additional resources

- **GiveWisely® Values and Passions** exercises (digital versions)
- www.northtexasgivingday.org thousands of vetted North Texas nonprofits that can be filtered by issue area, zip code, org budget size, etc.
- www.Candid.org (**formerly Guidestar**) provides publicly available data on U.S. nonprofits, including mission, contact info, leadership and basic financials from IRS Form 990s

Additional resources



Morgan Richards

Director, Charitable Gift Planning

Communities Foundation of Texas



Free GiveWisely® tools



Complete this quick survey to receive digital versions of our GiveWisely® Values and Passions cards to use with your clients.