

'How Much Do I Want to Give?' Tool

This tool is designed to help you get a clearer picture of your financial situation so you can make informed, confident decisions about your giving. It doesn't need to be exact – just a rough guide to help you plan.

Step 1: Your Financial Snapshot

Q1. How much money do you have in your accounts?

Q2. How much do you have invested, if any?

Q3. How much do you have direct access to?

Tip: This is usually the sum of answers to Q1 and Q2.

Step 2: Your Money In & Out

Q4. How much money did you earn from work in the last year?

Q5. How much, if any, do you make off shares each year?

Tip: If you're not sure, a simple way to estimate is to multiply the value of your assets in the stock market by 0.07.

Q6. How much, if any, did you receive in the form of gifts in the last year?

Q7. How much do you spend in an average year?

Q8. How much do you put aside in savings in an average year?

Q9. What is your approximate net annual discretionary income?

Tip: This is usually the sum of Q4, Q5 and Q6 minus Q7 and Q8.

Step 3: Reflecting On Your Giving

Q10. How much did you give last year?

Q11. What percentage of your assets did you give?

Tip: Divide your giving amount (Q10) by your total assets (Q3) and multiply by 100.

Q12. What percentage of your net discretionary income did you give?

Tip: Divide your giving amount (Q10) by your net income (Q9) and multiply by 100.

Step 4: Setting Goals for Your Giving

When setting a goal for your giving, consider a figure that feels easy to achieve and one that feels like too much of a stretch. A good amount can be found in between!

Choose which goal feels more relevant to you:

- 1. What amount and percentage of your income will you pledge to give this year? (% and \$)**
- 2. What percentage of your total assets will you pledge to give this year? If you do not have access to assets or savings, you can leave this blank. (% and \$)**

You may want to consider other factors when setting your goal, such as other major assets like property, incoming inheritance or capital events, or your family's financial situation.

Write a sentence about your intentions beyond this year – do you want to maintain or grow this amount? How and why?

What is the immediate next step you need to take to ensure you are moving towards achieving the goal you have just set? Write it down and then do it!