copper leaf
FINANCIAL

33 Blair Park Road, Suite #201, Williston, Vermont 05495
225 South Main Street, Rutland, Vermont 05701
Phone: 802-878-2731 ● Fax: 802-878-7197 ● www.CopperLeafFinancial.com

Determine an Annual Charitable Budget

Based on my annual income and expenses I am going to donate the following amounts towards organizations within my cause areas:

Annual Income OR Assets: _____   % for Charitable Budget: _____   Annual Giving Budget: $_____

Charitable Giving Worksheet

Following are my 3 core values:

_____   _____   _____

Cause Areas & Issues – My most important causes and focus areas are:

_____   _____   _____   _____   _____

Cause Area 1: _____ will be _____ % or $ _____ of my annual charitable budget.

Cause Area 2: _____ will be _____ % or $ _____ of my annual charitable budget.

Cause Area 3: _____ will be _____ % or $ _____ of my annual charitable budget.

Giving Budget: This year my budget is $ _____   Remaining $ _____

This is the total amount we wish to give via grants or direct charitable donations and it is to be divided between my cause areas.

Following are my 3 charitable "cause" areas:

Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Org: _____ $ _____	Org: _____ $ _____	Org: _____ $ _____
Total $ _____	**Total $ _____**	**Total $ _____**

Total Grants This Year $ _____

Resources

GiveWell: GiveWell is a nonprofit dedicated to finding outstanding giving opportunities through in-depth analysis: **www.givewell.org/.**

Center for High Impact Philanthropy: They provide an annual guide to causes it believes will do the most social good, complete with examples of nonprofits that employ donations effectively: **www.impact.upenn.edu.**

Charity Navigator: For each of the cause areas listed here one can find local organizations including charity "ratings" on the Charity Navigator. Also, search by cause area and refine the search by state: **www.charitynavigator.org.**

Guidestar: Search by state, however you cannot segment by cause area. Guidestar can provide financial details about the selected organization(s): **www.guidestar.org.**

GreatNonprofits: Provides detailed information about nonprofit organizations by state; ability to sort by cause and rating: **http://greatnonprofits.org/state/Vermont.**

Common Good Vermont: Provides general information about the number of Vermont nonprofit organizations by sector, county, organization or type: **http://data.commongoodvt.org.**

IRS: Tax Exempt Organization Search: **irs.gov/charities-non-profits.**