

Who's at the table:

It's been a big year. Grab a pen and anyone you'd give with. Use this to synthesize your collective vision and make a plan.

About 30 minutes. There are no wrong answers.

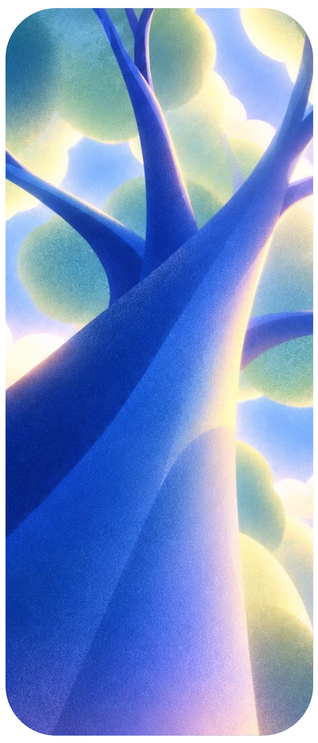


The forest

About 10 minutes

Zoom out on the last ten years. What returns do you see this year and over the last ten?

What could you give without changing how you live?



The trees

About 10 minutes

Which causes move you?

- [ ] Education
- [ ] Health
- [ ] Climate and environment
- [ ] Hunger and housing
- [ ] Arts and culture
- [ ] Animals
- [ ] Faith
- [ ] Your community
- [ ] Around the world
- [ ] Other _____

What problem do you wish someone would solve?

Which nonprofits are already working on it?

Name one for each cause. If others are at the table, everyone picks one, kids too. Look them up at app.endaoment.org/explore. Search by name or EIN.

Who	Cause	Nonprofit

Know a nonprofit whose page needs an update? Tell us at hello@endaoment.org.



Your plan

About 10 minutes

Where does giving fit in this year's plan? Little grants to many, or a lot to a few? Once, or annually?

This year

By midnight, December 31, 2026

- [ ] Open a donor-advised fund, or add to the one you have.
- [ ] Decide what to give: stock, cash, crypto, or something else.
- [ ] Fund it.
- [ ] Recommend a first grant to a nonprofit on this page.

Giving stock? It can take 1 to 2 weeks to arrive, so start early.

Open a donor-advised fund at app.endaoment.org

When you have time, or after it's funded:

- [ ] Experiment with investing in a portfolio
- [ ] Schedule recurring grants to the nonprofits you picked.
- [ ] Invite your advisor or a family member to the fund.
- [ ] Get to know the nonprofits you picked.

Funding it in a hurry? That's fine. Once it's funded, the rest can wait.

Something else: _____

First move:

Donate by: Before December 31

Come back to this on:

A donor-advised fund is something you come back to. The money is already set aside for giving, so there's time to get to know the nonprofits, bring others in, and give with a plan. Same time next year?

↗ Finished? Claim a free Endaoment hat here! Tag us on X or LinkedIn.

Endaoment does not provide financial or tax advice. Please consult your own tax or financial professional.