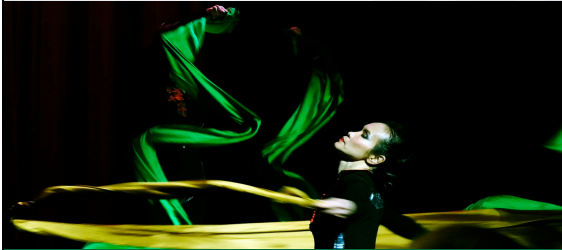



Planned Giving in Diverse Cultures
NORTHWEST PLANNED GIVING ROUNDTABLE
ANNUAL CONFERENCE | SEPTEMBER 2014



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Roadmap

1. Opportunities: Why it is important
2. Engaging: Useful ideas
3. Tips, Tools & Pitfalls: Increasing your awareness

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Opportunities: Engaging in Diverse Communities

Demographic shifts

- Local
- Regional
- International

Historical perspectives and affect on philanthropic sector

...While the roots of our community stretch back to various parts of Asia, including Mainland China, Hong Kong, and Taiwan, our community's interactions are also shaped by a 150-year history in this area. Where we live, where we work, where we feel a sense of belong – these all guide our philanthropic impulses at both a local and global level!"

- Rolland C. Lowe, MD, Chairman, Chinese American Community Foundation

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Philanthropic Practices and Motivations

Why do they give?

(Philanthropy is) "as an investment in people so they can better their circumstances and lives to help improve themselves and other and society in general."

"My family instilled that idea of giving to the less fortunate early on, and the idea just grew. We also like to instill that in our children also. They see what we do and eventually they'll be joining us, hopefully very soon."

"I am an investment professional, and if I make a return, I always like to celebrate by giving back to the society. I am a supporter of organizations that help people to better themselves and their societies."

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Philanthropic Practices and Motivations

Who do they give to?

"...education is the beginning and end of all problems"

"I am an investment professional, and if I make a return, I always like to celebrate by giving back to the society. I am a supporter of organizations that help people to better themselves and their societies."


"I really believe that prejudice and fear come from a lack of information, or a lack of understanding. So I like to donate to multicultural causes."

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Philanthropic Practices and Motivations

What charitable giving vehicles do they use?

- Giving Circles
- Family/hometown associations
- Churches/temples
- Mainstream vehicles

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Engagement & Cultivation

Who are your natural prospects?

Where do prospects get their information?

How do we engage and cultivate diverse groups?

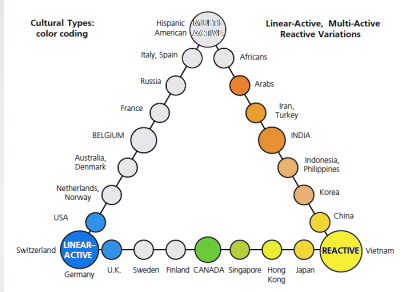
- Working with professional advisors
- Working with professional associations
- Relationship and trust: who asks?



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Having Philanthropic Conversations



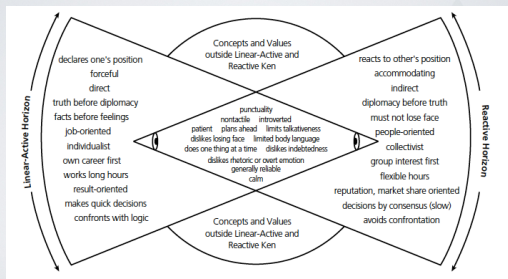
Source: When Cultures Collide, Richard Lewis



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Having Philanthropic Conversations



Source: When Cultures Collide, Richard Lewis



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Diaspora Philanthropy

U.S. Economic Engagement with Developing Countries, 2010-2011	Billions of \$	%
U.S. Official Development Assistance	\$30.9	11%
U.S. Private Philanthropy	\$39.0	14%
Foundations	\$4.6	12%
Corporations	\$7.6	19%
Private and Voluntary Organizations	\$14.0	36%
Volunteering	\$3.7	9%
Universities and Colleges	\$1.9	5%
Religious Organizations	\$7.2	18%
U.S. Remittances	\$100.2	36%
U.S. Private Capital Flows	\$108.4	39%
U.S. Total Economic Engagement	\$278.5	100%

Source: 2011 Global Philanthropy & Remittances, Hudson Institute

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International Aspects in Philanthropic Planning

Tax deductibility and planning

Gift processing and recognition

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