



Multi-Generational Perspectives and the Stories that Inspire Gifts.

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21/64 Generational Profiles & Personalities



5 Generations over the age of 18

- 1. Traditionalists**
- 2. Baby Boomers**
- 3. Generation X**
- 4. Generation Y (Millennials)**
- 5. Generation Z**



Exercise

- **Outside: List external conditions during formative years**
- **Inside: List character traits gained**



Character Introduction

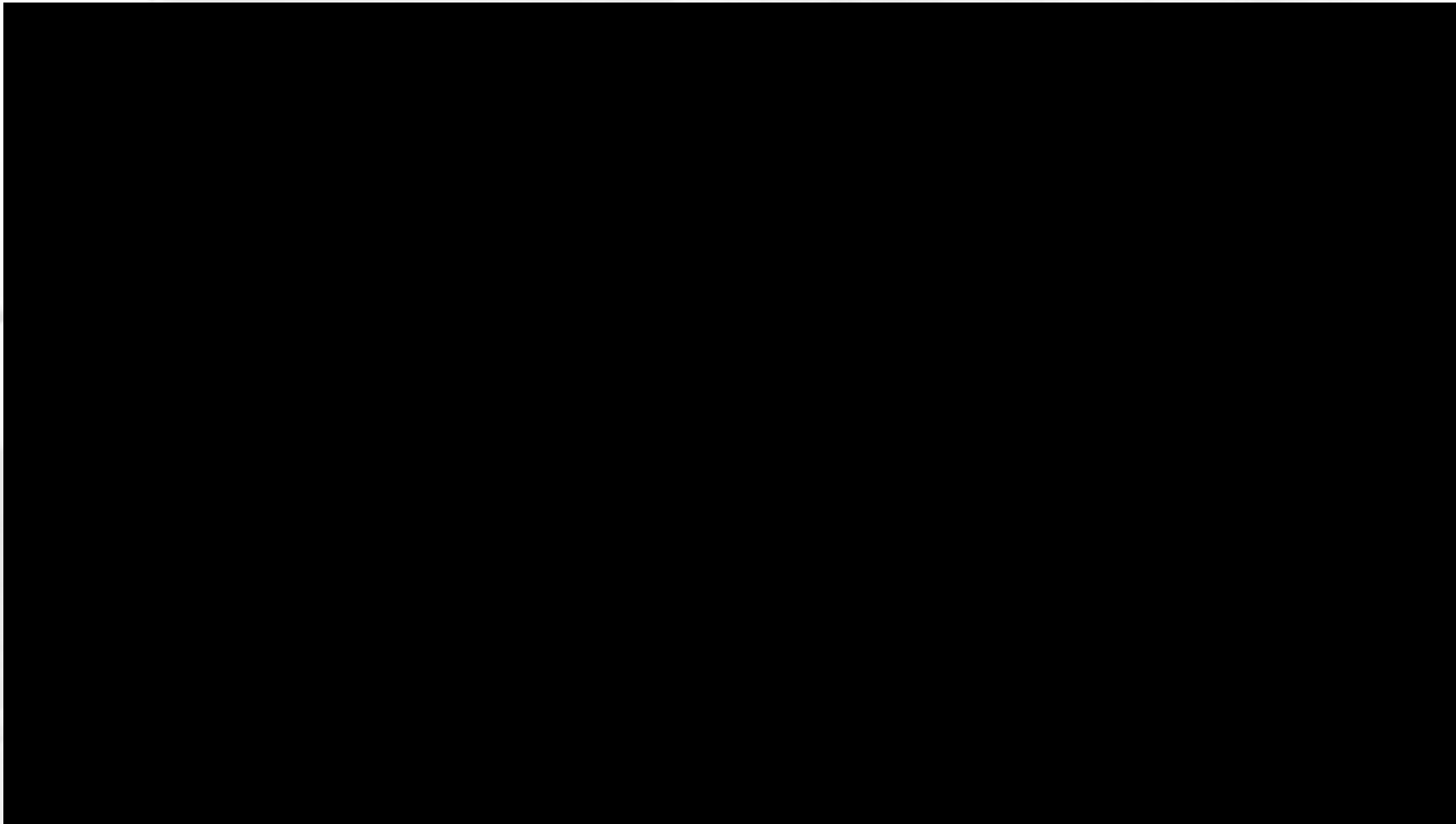
- **Who is your character?**
- **What influences them?**
- **Describe their giving behavior**



Character Application

- **Committee**
- **Board**
- **Donor**





Eliza's Final Song – "Hamilton" by Lin Manuel Miranda



**How do we guide
donors to
understand their
own “giving profile”?**



“Philanthropy is a private action in a public space.”

- H. Peter Karoff

(Late Founder of the Philanthropic Initiative)



80% Americans give annually

**5-6% over age 60 have a
charitable estate plan**

- Dr. Russell James

(Neuroimaging and Charitable Bequests, January 1st, 2014)





“Legacy is heritage and heritage is tradition. Traditions are actions captured. Legacy is the most important tool any human possesses. The world will go on forever after we’re gone. How will each of us positively impact its trajectory? That is Legacy.”

Scott C. Fithian in The Right Side of the Table



Storytelling

GIVING AS AN ACT OF FAITH

TWO GENERATIONS - ONE SHARED COMMITMENT TO LEGACY GIVING
by Doug Nathan



*Nancy & Joel Shinder (left and right), with their daughters
(middle L-R) Juliana Sellers, Sarah Bakkum, and Dannah Shinder*

Nancy & Joel Shinder

As an interfaith couple who raised their three daughters to



Juliana & Jacob Sellers with sons Ari (left) and Eli (right)

Juliana & Jacob Sellers

Raised to celebrate the respective faiths of parents Nancy &



Interview Environment

- **Where your donor can process their philanthropy... Maybe for the first time.**
- **This is personal**



Process

- **Ask**
- **Listen**
- **Ask deeper questions**
- **Listen more**
- **Allow a natural flow**



Questions

- **First memory of giving?**
- **Teachings from childhood?**
- **Role models?**
- **How do you mentor next gen?**



Manage Expectations

- **Allow for natural flow**
- **Practice mindfulness in your meeting – be in the moment**
- **Guide subconscious vision/values forward**
- **Share story publicly for inspiration**



**Multiple generations can work together
to create greater impact.**

- **What could be our role?**
- **Who benefits?**



Please invite donors to think about their legacies, because they are crafting it every day.



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