

Charitable Giving Budget Template

Lifetime Giving Budget for calendar year 20__

Source	Amount	Allocated to	
		Focused Giving	Social Giving
Current Income			
Net Worth			
Total			

Estate Giving Budget

At my death, I will give \$ _____ or ____% of my net worth to charities.
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Examples of Giving from Current Income

Percent examples	Current Annual Income					Other \$
	\$20,000	\$40,000	\$60,000	\$80,000	\$100,000	
1%	\$200	\$400	\$600	\$800	\$1,000	
2%	\$400	\$800	\$1,200	\$1,600	\$2,000	
5%	\$1,000	\$2,000	\$3,000	\$4,000	\$5,000	
8%	\$1,600	\$3,200	\$4,800	\$6,400	\$8,000	
10%	\$2,000	\$4,000	\$6,000	\$8,000	\$10,000	
Other:						

Examples of Giving from Net Worth

Many plan to hold onto their net worth (assets minus debts) until they no longer need it for living expenses, and do not donate from net worth during their lifetimes. Others are comfortable that their net worth is large enough to handle living expenses and also allow for current giving to charity.

Percent examples	Net Worth				Other \$
	\$100,000	\$250,000	\$500,000	\$1,000,000	
1%	\$1,000	\$2,500	\$5,000	\$10,000	
2%	\$2,000	\$5,000	\$10,000	\$20,000	
5%	\$5,000	\$12,500	\$25,000	\$50,000	
8%	\$8,000	\$20,000	\$40,000	\$80,000	
10%	\$10,000	\$25,000	\$50,000	\$100,000	
20%	\$20,000	\$50,000	\$100,000	\$200,000	
40%	\$40,000	\$100,000	\$200,000	\$400,000	
60%	\$60,000	\$150,000	\$300,000	\$600,000	
80%	\$80,000	\$200,000	\$400,000	\$800,000	
Other:					