

Lesson 5 Exercise: The Life Journey of Aspiration Giving

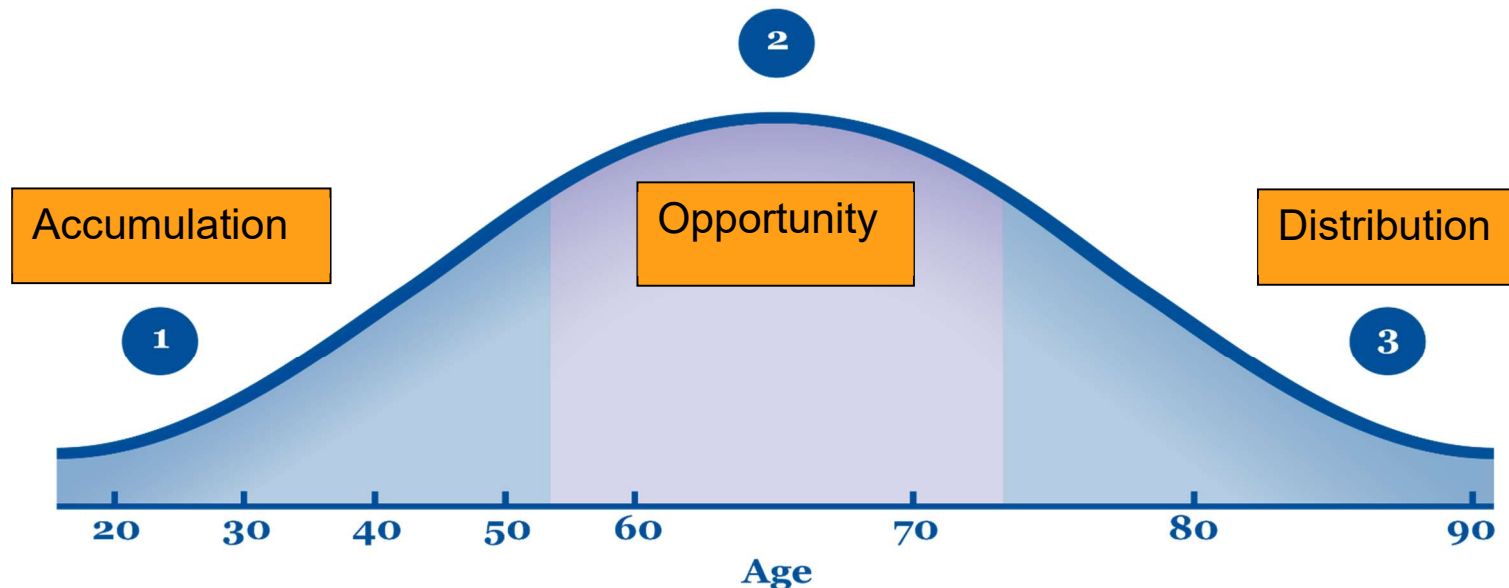
Donor Fundamentals

Aspirational Philanthropist Learning Program

Learning Objectives:

1. To understand the phases, typical milestones, and transitions of the *Life Journey of Aspirational Giving*.
2. To clarify the donor, significant other (SO), life-learners' (LL), and elders' phases and life journey milestones.
3. To empower donors with the confidence and knowledge to have conversations with inner circle members.

The Life Journey of Aspirational Giving



Lesson 5 Exercise: Your Life Journey of Aspiration Giving

Directions: Fill in the chart below for each member of your Inner Circle.

The Inner Circle & The Life Journey of Aspirational Giving									
Inner Circle Member	Donor	SO #1	SO #2	Elder #1	Elder #2	LL #1	LL #2	LL # 3	Notes
Name									
Current Age									
Current Life Stage									#1= Accumulation; #2=Opportunity; #3=Distribution
Transition* #1; Age:									
Transition #2; Age:									
Transition #3; Age:									
Transition # 4; Age:									
Transition #5; Age:									

* Examples of transitions may include college, marriage, divorce, job/career change, retirement, relocation, business startup