

THE FORTÉ GIVING PLAYBOOK

THOUGHTFUL APPROACHES
TO CHARITABLE GIVING



This is your blueprint for intentional, confident giving.

Whether you are planning your first donation or refining your long-term impact strategy, this playbook helps you turn generosity into leadership.

When women give strategically, they do not just fund causes. **They fuel change.**

Give with clarity.
Lead with generosity.
Do well. Do good.

PILLAR ONE

Clarify Your Cause

DEFINE WHAT MATTERS MOST

Start by identifying what moves you. Your giving should reflect your purpose, not pressure.

Ask yourself:

- Which issues or communities align with my values?
- Do I want to make change locally, nationally, or globally?
- Which organizations are already doing effective work in those areas?

Focusing your giving helps amplify your impact. Choose a few causes that truly resonate rather than scattering your support too widely.

EVALUATE BEFORE YOU GIVE

Be informed and intentional about where you give. Take time to understand how each organization operates and what results it delivers.

Review:

- Mission and leadership
- Transparency and accountability reports
- Community testimonials or measurable outcomes

Use tools such as [Charity Navigator](#) or [Candid](#) to confirm that your donations are well-managed and aligned with your goals. A strong nonprofit invests not only in programs but also in the infrastructure that sustains them. Real impact requires solid foundations.

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play it out

List your top three focus areas and the organizations you will explore this season.

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play it out

Choose one organization to research more deeply this week. Note what you learn about its mission, leadership, and results.

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PILLAR TWO

Maximize Your Impact

PLAN WHAT YOU WILL GIVE

Giving with purpose is not about the size of your donation. It's about consistency and clarity.

- Set a target such as a percentage of income or a specific annual goal.
- Combine one-time gifts with recurring donations.
- Automate contributions so generosity becomes a rhythm, not a reaction.

MULTIPLY EVERY DOLLAR

Your impact can grow faster than you think.

- Ask about workplace matching programs that can double or triple your contribution.
- Some employers also match volunteer hours, which turns your time into tangible value.
- Consider joining or starting a giving circle to pool resources and amplify collective power.

GIVE STRATEGICALLY

Financial creativity can stretch your generosity.

- Donate appreciated stock to avoid capital gains tax.
- Establish a Donor Advised Fund (DAF) to give now and allocate strategically over time.
- Revisit your giving plan each year to stay aligned with your goals and current needs.

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play it out

Use the Forté Giving Card to document your giving goals, methods, and timeline. Record matching opportunities and note where you want to deepen engagement next year.

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PILLAR THREE

Activate Your Plan

TRACK AND REFLECT

Keep a record of your giving, including amounts, dates, recipient organizations, and tax-deductible status.

At the end of the year, ask:

- What difference did my giving make?
- What felt most meaningful?
- What do I want to adjust or expand next year?

Tracking creates clarity. Reflection creates growth.

GIVE BEYOND THE WALLET

Your influence extends beyond finances. Volunteer, mentor, or share your expertise through Forté or other mission-driven networks. Generosity in time, talent and treasure are all forms of leadership.

MAKE GIVING TUESDAY YOUR MOMENTUM MOMENT

Giving Tuesday is the perfect time to act on your plan. Treat it as a checkpoint, not a deadline. Plan your theme, set your goals, and decide how you will make an impact. Whether that means cash, stock, a DAF, a match, or a giving circle, make your generosity visible and joyful.

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play it out

Complete your Forté Giving Card and set a reminder to review your progress each year.

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Plan it.
Make it
meaningful.
Share it.

THE FORTÉ Giving Card

Your action tool for planning, tracking, and
reflecting on your generosity.

YEAR: _____

This year, my giving theme is: _____

I plan to give to: _____

My gift amount or goal: _____

My giving method: Cash / Stock / DAF / Match / Circle

I will make my gift by: _____

Reflection: What impact did my giving create this year?

Visit fortefoundation.org/give to activate your plan and help more
women access education, leadership, and opportunity.

Do well. Do good. Do it with Forté.