



Proactive

Discover Your Passion

Have you defined success for your giving?

Paul and Rebecca Carter first met Excellence in Giving in 2008 when Paul’s mom and dad became clients. They had seen firsthand how Excellence in Giving helped make their philanthropy easy and effective.

After Paul sold his company, he realized his desire to engage in philanthropy at a deeper level. He and Rebecca became Excellence in Giving clients in 2016.

Start by Defining your Giving Goals

Excellence in Giving recommended they start with the Discovery Process. Our president, Al Mueller, led the 2-hour interview to guide Paul and Rebecca in conversation about their backgrounds, interests, and how they dream about changing the world. They explored their past to inform their future goals.

72%
Of Clients

use our *Discovery Process* to clarify giving goals

While the Carters could already verbalize many of their philanthropic goals, the Discovery Process allowed them to consider the full scope of what they enjoy (and don’t enjoy) about their giving.

In the end, their *Joy-Filled Giving Profile* defined goals and preferences. But more importantly, it empowered Paul and Rebecca to effectively communicate family values and giving goals to their three teenage daughters.

As Rebecca read the first draft of their giving profile, her audience immediately became her daughters who, she realized, probably did not know much about the family’s giving priorities and philosophies.

A Tool to Communicate with Family

Even though Rebecca and Paul were in sync about what they wanted to accomplish with their philanthropy, they had never put it in writing. Now they had on paper a clearly defined vision to share with their kids.

Nearly a year later, Paul began working with another organization to define his personal and professional goals after selling his company and starting a new chapter of his life. He shared new discoveries about himself with Excellence in Giving, and they added this new information into the giving profile.

The Joy-Filled Giving Profile became a helpful tool to have new conversations about what the Carter Family stands for and what their philanthropy is all about.

Excellence in Giving now helps the Carters execute their giving according to the values they documented.



“Excellence in Giving has helped us succinctly explain to others how we approach giving.”

- Client from Fort Worth