# Philanthropists

### What's on the minds of today's donors as they navigate uncertain times?

We asked our private foundation clients and donor-advised fund account holders to weigh in on everything from their current priorities and interests to challenges they're facing.

Seeking new grantee partners



"We are prioritizing conducting research and seeing community input to inform how we can best contribute to systems change."



Prioritizing giving opportunities

31%

30% Creating a bigger impact

25%

Measuring impact

Devoting sufficient time to charitable planning and activities 22%

**Engaging the next generation** 

21%

"We are working on relationships with organizations and making our priorities clear."

As donors consider their long-term strategy and operations, these are their

# Top 5 Areas of Interest













channels of giving to our grantees. I'd also like us to increase our responsiveness to organizational needs outside of our traditional giving cycle."

## Pursuing Impact An emerging cohort of donors is exploring integrated planning, budgeting and tax

approaches to help them become more effective givers.

about the tax benefits of giving

Learning more

of their income or portfolio to services it can pave the way for greater impact by establishing clear areas for prioritization,

Allocating a

larger percentage

Setting annual giving goals

Thinking about

charitable giving as part of their

Having a defined budget

to make gifts financial plan charitable causes "When philanthropy services are more closely coordinated with other wealth management

decrease erosion from taxes." — GILLIAN HOWELL, NATIONAL PHILANTHROPY EXECUTIVE, FOUNDATION SOURCE

while also ensuring the use of thoughtful approaches that can help increase funding and

TAKE THE NEXT STEP >>

The data presented here is from a digital survey conducted between January 16 and February 20, 2025. Responses are from 294 private non-operating foundations and 106 donor-advised fund account holders with the sponsoring organization, Charityvest.

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