

Morgan Stanley

Dominic Cellitti
Senior Portfolio Manager
First Vice President
Wealth Advisor

Wealth Management
1330 Post Oak Blvd
Suite 900
Houston, TX 77056
tel 713.968.300034
fax 713.968.3200

Creating Your Family Philanthropic Mission



“There is no cause half so sacred as the cause of the people. There is no idea so uplifting as the idea of the service of humanity.”

- Woodrow Wilson

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The Family Mission

Once your family's values have been formulated, you can use them to create your family mission. Both large and small activities benefit from a philanthropic purpose or mission. To ensure cooperation and a unified goal, allow all the family members to voice their opinion about the family's mission. Being joined as a family is the glue which will bond you all together so your customized family mission statement can be created. Each family member is responsible for their part of the mission. Once the individual missions are created, your family can move forward to align the individual missions to create a unified family mission.

A good method to establish a family mission statement is to document the five "Ws" of philanthropy: Who, What, When, Where, and Why. It is necessary that each member of your family individually write their own five "Ws." If you have younger children, help them arrive at their five "Ws." If you have older children, you may need to motivate them by discussing the importance of the exercise and how having a focused, team oriented mission will allow you family to most effectively help others. When you formulate your philanthropic mission, your family will be best able to work together as a team



to reach the set goals. As we all know, when you have a detailed plan and every member of a team works together to achieve the same goals, the results will then be most impactful. Without a plan that everyone "buys into" your results will just be a "hit" and "miss" experience. Next, we will review each of the five "Ws" individually.

THE FIVE "Ws"

WHOM: The "whom" defines specifically what individual(s) or what type of organization(s) you want to help. This could be an individual, such as a family member, neighbor, or even a complete stranger. The "whom" could be an

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organization or an entity such as a homeless shelter, a church group, or a specific charity, such as the American Red Cross. It would not be unusual for each family member to have multiple “whom” beneficiaries. Unless the family is already working together charitably, each member will probably have different “whom” beneficiaries.

WHAT: The “what” defines the goal(s) you want to accomplish with volunteering or charitable giving. The goal(s) will serve as the “blueprint” for impact. Again, different family members will probably have different goals. A goal could be a general statement such as, “I want to help needy children in “my hometown,” or “I want to serve as a mentor for a child in the Big Brothers Big Sisters program.” The “what” will also include the amount of money each family member or the collective family plans to donate to various charitable causes.

WHEN: The “when” defines how many hours a week or month your family will volunteer. Further, the “when” will detail the timeframe of the engagement. For donations of money or goods to various charities, the “when” will define the specific date and times when the donations will occur. For instance, your family may establish a fixed date each week to assist one particular charity. They may also randomly help a variety of causes at different times of the week. Each family member will need to discuss with the others specifically how much time they have to assist others and what times work best.

WHERE: The “where” defines the physical location for volunteering or donating money or goods. The family can decide if they want to volunteer, give money or goods locally, nationally, or internationally. They might choose a combination as well.

WHY: The “why” is the most important “W” because it defines the internal motivation that each family member has for helping others. Each family member needs to determine his unique motivation for helping various charitable organizations. Each family member will probably have a different motivation for helping others. Having different motivations will not inhibit your family mission. In fact, understanding each family member’s motivation will bring the family closer to arrive at a collective mission.

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After the five “Ws” are answered individually, compose a family mission statement that best incorporates your family’s ideas. Sit



down and determine how to blend the individual “Ws” into a collective family focus. A meeting will allow each family member to tell the others his own philanthropic mission (the five “Ws”). After each family member has shared his vision your family should work together to create the collective family focus that every family member will support. This family focus is the Family Mission Statement. The Family Mission Statement should not exceed one hundred words, and should never exceed one paragraph. For large families, or families where each individual family member has a totally different philanthropic focus, arriving at a consensus may be difficult. Remember, in order for your family to be philanthropically impactful, each member will need to feel as if their individual voice has contributed to the collective family mission. Below are details of a Family Mission Statement for the hypothetical Smith family.

The Smith Family Example

The Smith family consists of Rob (the father), Jenny (the mother), Michael (the nine-year-old son), and Michelle (the twelve-year-old daughter). Rob and Jenny asked Michael and Michelle to help them to create the family’s charitable focus (mission). The children agreed they wanted to “do their part” to help others in need. Rob and Jenny asked the children to create their own unique mission statement to document the five “Ws” of each of their missions. Michael asked his mother to assist him while Michelle completed hers by herself.

The Meeting

After each family member completed their own mission statement, the family had a meeting one evening. Each family member discussed their individual mission statement with the other family members. It was no surprise that everyone had different “whom” beneficiaries. The family discussed each beneficiary in detail. They then voted on the top two or three charitable ideas. The family did



not dismiss the other ideas outside of the top three; rather they planned to revisit them the following year. The family agreed they wanted the philanthropic focus

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to be local. Further, the family discussed and arrived at specific times of the week when all family members were available to volunteer.

Summary of the Smith Family Mission

“The Smiths”—Jenny, Rob, Michael and Michelle—will collectively volunteer at the Hillside Retirement Center each Wednesday evening for two hours. The children stated that since Grandma Jane lives there, we have noticed many residents are lonely and without visitors. As a result, we want to spend time with the residents who are lonely. In addition, the family will spend no less than three hours together volunteering two weekends a month on a Saturday morning or Sunday afternoon at the Anytown Doggie Shelter. In memory of their dog, Cooper, the family wants to help animals find forever homes. The family will foster dogs in their home too. Because Grandma Edith and Aunt Cindy had breast cancer, the family will work to raise no less than \$2,000 a year for the American Cancer Society. They will walk in the Susan G Komen Race for the Cure.

Here is a breakdown of the collective family mission statement created from each individual’s five “Ws”

Whom: Hillside Retirement Home, Anytown Doggie Shelter, American



Cancer Society, Susan G. Komen Foundation

What: To help lonely seniors in need, help local homeless dog find forever homes; participate in the Susan G Komen breast cancer walk and raise \$2,000

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When: Two hours a week at Hillside, three hours for two weekends a month at Anytown, and each spring for Susan G Komen Breast Cancer walk

Where: Local volunteering at Anytown Doggies Shelter, Hillside Retirement Center, and Susan G Komen Walk

Why: They want to assist seniors because of Grandma Jane, homeless dogs because of Cooper, and breast cancer survivors because of Grandma Edith and Aunt Cindy

Having the family five “Ws” complete, the family then crafted their mission statement.

The Smith Family Charitable Mission Statement

“The Smiths will focus their charitable mission on local causes to support lonely seniors, dogs who need forever homes, and breast cancer survivors. They will support these causes through a combination of family volunteering, participation in a spring fundraiser, and financial donations.”

Now that you have established your family’s values and constructed your mission statement, your family can understand your philanthropic vision of how effectively to help others.



Ask Yourself

How can a simple garden feed the world?

Is there a simple deed your child could turn into a major deed?



Call to Action

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Your Family Philanthropic Mission Statement	
Today's Date	
Does your family have a mission statement?	

Teaching Children	
Use this worksheet for yourself and ask other family members to write five "Ws" on a separate sheet of paper	
Whom do I wish to help?	
What do I want to accomplish?	
When do I want to help?	
Where do I want to help?	
Why do I want to help?	

Further Actions: The Family Mission	
Whom do we collectively want to help?	
What do we wish to accomplish?	
When do we wish to help?	

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Where do we wish to help?	
Why do we wish to help?	
When do we want to help?	
State your family's Mission Statement here.	

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