

Morgan Stanley

Philanthropic Discovery Questionnaire

Welcome to the starting line of a clearly defined giving plan. You are beginning a journey of examination and revelation. This questionnaire is designed to probe, to challenge and to raise important issues. We hope you find this work enlightening and the process enjoyable.

The process you are beginning here will allow you to clarify and articulate your beliefs, providing a strategic direction for your giving. This is a journey that will allow you and your family to experience the joy of focused and meaningful giving. We designed the Philanthropic Discovery Questionnaire to engage you in

honest observations concerning your life. This is not a test with right or wrong answers. In fact, we recommend that you do not write out detailed answers to each question. Instead, simply note thoughts that will remind you of your initial observations that we will be able to discuss when we meet.

NOTE: We want to offer one important caution. Fight that temptation of being critical of yourself and focus on the present reality, not ideal circumstances. Self-criticism or immediate attempts to change will make it harder to stay objective.

Family Background and Values

Your family background and upbringing provide insights into your motivations for giving. These questions will help you and your Morgan Stanley Wealth Management team, in coordination with your outside advisors, identify patterns and themes that form the foundation of your giving profile.

Describe where you grew up and the house in which you lived as a child.

What kind of work did your parents or guardian(s) do? How would you describe your family's economic situation growing up?

Describe two or three events that happened to you before the age of 20 that most affected your view of life.

Growing up, what people in your community did you think needed the most assistance? How did you volunteer or try to come to their aid?

As children, most of us learn about money either through the teaching or example of our parents. Which lessons about money related to giving have carried over into your life as an adult?

Educational and Professional Development

The educational and early career years are some of the most formative. These experiences solidify your beliefs and develop the modus operandi for the rest of your life. This series of questions help you to pinpoint your passions, interests and motivations.

What was your first real job? What important lessons did you learn from this experience?

What would you describe as your unique talents, gifts and skills? What have these qualities helped you accomplish?

If you have had a professional career, how did you get your start and how did it take you to where you are today?

In retrospect, looking back on your career, what are you most grateful for? What has been the biggest disappointment in your professional life?

What energizes you to get out of bed in the morning?

Personal Development

While family, education and your profession have a significant influence on who you have become, it is often through personal experiences that you grow. The next set of questions explores stories of your life that ultimately shaped your perspective. These are key ideas to identify heartfelt passions.

Describe the happiest moments of your life. Is there a common thread that runs through those happy moments?

All of us have experienced losses, crises or suffering in varying degrees. Identify these events as they manifested in your life and describe how they have changed your perspective.

If you had a chance to live life over again, to make different decisions and choices, what would you do differently? What would you do sooner?

As you look at how you spend your time now, what activities do you enjoy the most? Which activities do you consider to be the most worthwhile?

Name a person, living or dead, that you'd like to interview and why.

Spiritual Development

The path of your spiritual development tells a deeper story about how your set of experiences and sensitivities could be used to help others. This section of the questionnaire addresses practices and values as they relate to your spiritual life.

Describe how your spiritual life has evolved. What were some important milestones in your spiritual life?

Describe the beliefs, values or attitudes that are pivotal in guiding your life.

What relationships/groups are most important as support for your beliefs or values?

Do you share the same spiritual beliefs as your spouse? Children? If not, how do you handle those differences?

Resources: Time, Talent and Treasure

How people handle their time, talent and treasure is often an important indicator of values and priorities. Resource allocation decisions indicate a particular world view. The answers to the following questions are an important component in building a giving plan that is customized to what you value most.

What do you value most? What would you most hate to lose? Why?

Excluding your family, who or what have been the most significant influences in forming your ideas about wealth?

What are your greatest joys that arise from having substantial resources?

What are your greatest struggles that arise from having substantial resources?

What is your decision process when faced with a choice that will require a large amount of your resources (e.g., significant time commitment, significant purchase)?

Perspectives on Wealth

Perspectives on wealth form a deep and consequential biography of our lives. The questions that follow will challenge you to think honestly about how your relationship with your financial resources affects other parts of your life.

What qualities or circumstances do you believe account for your success at accumulating wealth?

What effect has your wealth had on your personal relationships? Describe some challenges that have come with having significant wealth.

What is your biggest hope as it relates to money? What is your biggest fear as it relates to money?

Do you consider giving to be primarily an obligation or an opportunity?

Giving Practically

We believe giving should be both “strategic” (effective) and “leveraged” (efficient). As we explore giving opportunities, the following questions will allow us to understand which organizations interest you most.

If you were answering this questionnaire one year from now, what would need to happen between now and then for your giving journey to have been a success?

Describe the nonprofits that you support. What are your reasons for giving to these organizations?

In hindsight, what single charitable gift or activity has given you the most joy?

Do you know how effectively the organizations you support have been using the money?

How would you describe some of your frustrations with giving?

Which of the following charitable areas are you passionate about or interest you the most? Rank the top five.

- Education
- Family
- Homelessness
- Poverty
- Spiritual Growth
- Sickness, Health Crises
- Scientific Research
- Hunger/Starvation
- Men's Issues
- Women's Issues
- Children's Issues/Rights
- Disaster Relief
- Economic Difficulties
- Religious Activity
- Environmental Issues
- Civil Rights
- Religious Education
- Orphans
- International
- Specific Organization:
- Public Policy
- Leadership Development
- Aging/Elderly
- Arts/Culture
- Specific Country/Region:
- Other:

Your Legacy: Finishing Well

One of mankind's greatest needs is to leave a legacy. Writings on cave walls, on tree trunks, in wet cement and on desert scrolls are all expressions of this. What mark do you want to leave behind? This series of questions seeks to identify the lens through which you view the future and the imprint you wish to create.

What activity gives you the greatest feeling of personal fulfillment and significance?

What circumstances would have to happen between now and the end of your life for you to leave this world with no regrets?

When people think of you, describe two things that you want them to remember most.

If you had only 30 days to live, no physical restrictions and unlimited financial resources, how would you spend this time?

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