Discovery Questions on Charitable Giving and Meaning

These questions are designed to help retired business owners explore how their charitable giving can be aligned with a future sense of purpose and personal meaning.

1. What causes or issues have always mattered deeply to you—but were placed on hold during your business career?

2. How does your charitable giving reflect your core values today—not just your past priorities?

3. Are there personal life experiences that have shaped your desire to give back in specific areas?

4. What kind of long-term impact do you hope your giving will make?

5. Do you want your giving to reflect gratitude, justice, legacy—or something else?

6. How involved do you want to be with the organizations or people you support?

7. In what ways could charitable giving become an avenue for personal growth or spiritual fulfillment?

8. Are there causes you support that no longer resonate—or new ones calling for your attention?

9. How might your giving model (foundations, DAFs, scholarships, etc.) express your evolving identity?

10. What would it mean for your giving to be not just generous—but *meaningful*?