SecondWave Date: _____

Treasure Tool - Worksheet

Questions to consider first:

1. Where do you feel is the best investment of your money?

2. Do you feel any ambivalence? What is at the heart of your ambivalent feelings?

3. What good will be done with your money? What makes spending it there a worthwhile investment?

4. Which values are aligned with your decision - how important the people are to you, who needs help the most, a worthwhile cause, or some other reason?

5. Looking back at all the work you have contributed, what investment right now will make you feel it was worth the effort all those years for the sake of this?

SecondWave Date: _____

Treasure Tool - Worksheet

Your Treasure plan:

List the Tribes identified in your earlier work, the Core Values connected to each, and the financial commitment you are willing and able to make.

For annual or one-time gifts, divide the amount by 12 to show a monthly equivalent. Include the gift amount and frequency in the Treasure column.

Tribes	Core Values	Treasure Amount / frequency / monthly equivalent

Total proposed monthly contributions: $ _____

Do these contributions align with your overall financial plan? If not, do not make the commitment.

Core Values reflection: Does your charitable investment reflect your Core Values?

Personal notes: