



Write a Charitable Bucket List

Creating a bucket list can be a great way to visualize your long-term money goals and -- more importantly -- start checking them off. [But as the science linking giving to happiness grows stronger](#) many people have started creating charitable bucket lists that can help improve Return on Life for themselves, their communities, and people in need.

Here are three ideas for filling your own giving bucket that could connect your money to your life in more meaningful ways.

1. Develop your mission.

If you'd like to move beyond writing a check or clicking a donation button when the mood strikes you, consider formalizing your giving with a plan.

A great first step can be to sit down with your family and have a conversation about what's really important to you all. Use this discussion to create a family mission statement that will guide your giving goals, identify potential recipients, and help you budget your giving for the year.

Aligning your whole family around some specific charitable goals doesn't just set a great example for future generations. A family mission can also motivate younger family members to carry on those goals as part of your legacy planning.

2. Identify the best way to give.

In most cases, the easiest way to execute a giving mission is to set up a recurring donation with a charity or nonprofit. No matter what cause or problem you're trying to help, cash is always welcome because it doesn't have to be packaged, shipped, and unpacked to do good. Most charitable organizations will send you a giving statement at the end of the year for tax purposes, but it's always a good idea to keep your own records as a backup.

To make sure your generosity is going to fulfill your goals, do a little bit of research about any charities you're considering. Websites like [Charity Navigator](http://www.charitynavigator.org) (www.charitynavigator.org) rate organizations on their trustworthiness and can give you a better understanding of how your money will be used. In general, be wary of start-up charities or crowdfunding campaigns that aren't subject to comparable oversight or review. And if you're giving to huge international organizations like the Red Cross, expect that some of your money is going to pay for the infrastructure that helps these groups respond quickly when they're needed.

If your family wants to address a need that's closer to home or underserved by existing charities, you might consider starting a family foundation, an endowment, or a donor advised fund. These vehicles can help sustain your mission in perpetuity, but they also raise a range of issues from tax planning to organizational structure that you'll need to address with an advisor.

3. Get your hands dirty.

While giving plans often focus on financial contributions, consider topping off your giving bucket with in-person volunteering:

- [Habitat for Humanity](#) has a variety of projects around the world and in all 50 states.
- Your local food pantry or meal center needs help serving families year-round, not just at the holidays. In addition to volunteering, you could organize a food or clothing drive in your neighborhood.
- Retirees might consider mentoring the next generation of professionals, teaching at a local community college, or working part-time at a nonprofit that could benefit from your professional skills.
- [Voluntourism projects](#) could help you and your family cross off some travel goals while immersing yourselves in a new culture and making a positive impact.

Have the struggles of the pandemic or recent global events recalibrated your charitable goals? It might be time to review your Return On Life (ROL) priorities to make sure you're getting the most from your money. And if you have some newer, bigger giving goals, we can talk about plotting those on your financial plan to meet them.

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