



GIFTING WORKSHOP PLANNER

A Guide to Prepare for Your Gifting Workshop

How to Use This Planner

Planning conversations can feel unfamiliar especially if this is your first time thinking intentionally about finances and family together.

This planner is simply a place to slow down, reflect, and organize your thoughts before your Generational Gifting Concept workshop. There are no right answers, no commitments, and no expectation that you finish every section.

Important Note Before You Begin

This planner is designed to help you organize your thoughts and questions before your Generational Gifting Concept workshop. It is for educational and preparatory purposes only.

It does not provide financial, legal, tax, or insurance advice, and it is not a recommendation to take any action. Your workshop is an introductory conversation intended to explore goals and intentions. Any planning decisions should be made with appropriately licensed or qualified professionals based on your individual circumstances.



Your Why

Understanding what's bringing you here

Before discussing numbers or plans, it helps to pause and understand why gifting feels important right now. Starting with your motivations helps ground the conversation in what matters most to you, not just what's possible.

This section gives you space to reflect on what prompted you to explore generational gifting and what you hope it represents.

Questions to think about

What prompted you to explore gifting at this stage of life?

Was there a moment, event, or realization that brought this forward?

Write if helpful

"For me, gifting is important because..."

"When I think about my family's future, I want..."

"One concern I want to address through gifting is..."



Who You're Gifting To

Focusing on people, not just beneficiaries

Generational Gifting is ultimately about people and relationships. Taking time to think about who you're supporting and where they are in life helps clarify intentions before discussing structure.

This section helps you consider the individuals involved and what support might mean to them, beyond dollars.

Questions to think about

Who are the people you're considering gifting to?

What stage of life is each person in?

Write if helpful

“The people I'm thinking about include...”

“What I hope this support helps them with is...”

“Something I want to be mindful of is...”



Your Values & Intentions

What you want the gift to stand for

Many giftors want their gifting to reflect deeper values, not just financial help. Clarifying those values early helps guide thoughtful conversations later.

This section invites you to think about what you want your gifting to communicate and reinforce.



Questions to think about

What values matter most to you?

What do you hope generational gifting encourages or supports?

Write if helpful

“The values I want my gifting to reflect are...”

“I hope this gifting plan encourages...”





Financial Comfort & Fit

Making sure gifting works for you, too

Generational Gifting should feel supportive not stressful. This section helps you think through comfort, flexibility, and how gifting might fit into your broader financial life without requiring decisions or calculations. It's about understanding what feels sustainable and aligned for you.



A Comfortable Gifting Budget

What amount feels supportive without creating pressure?
How would you feel if circumstances changed?

Short to Mid-Term Needs & Access

Are there foreseeable expenses or transitions ahead?
How important is flexibility?

How Gifting Fits Into Your Current Financial Picture

How does gifting align with your current priorities?
What's already working that you want to preserve?

Comfort With Control & Ownership

How involved do you want to remain?
When, if ever, might ownership change?



Timing & Life Context

Why now matters

Timing often reflects life changes, priorities, or readiness. This section helps you place gifting within the context of your current stage of life. There's no need to set a timeline, only to reflect.

✦ *Questions to think about*

Why does now feel like the right time?

Are there upcoming life changes to keep in mind?

✦ *Write if helpful*

“Now feels like the right time because...”

“Over the next few years, I’m prioritizing...”



Questions You Want to Ask

Giving yourself permission to be curious

It's normal to feel unsure of what to ask, especially if this is your first planning conversation. Writing questions ahead of time can help you feel more confident and present. This section is a place to capture anything you don't want to forget.

You may find one or two of these helpful:

- “What considerations should I be thinking about based on what I’ve shared?”
- “What do people often overlook when exploring gifting for the first time?”
- “How do others think about balancing support with independence?”
- “What are common ways people approach flexibility or access over time?”
- “How do people usually decide when to take the next step or not?”



What a Meaningful Outcome Looks Like

Defining success in your own words

Questions to think about

How do you want to feel after the workshop?

What kind of clarity are you hoping for?



A meaningful outcome doesn't require decisions or next steps, sometimes clarity alone is valuable. This reflection helps you define what would make the workshop feel worthwhile.





Final Note

This planner is designed to support thoughtful conversation, not replace professional guidance. Your Generational Gifting Concept practitioner will use the workshop to listen, ask questions, and help identify areas where licensed or professional support may be appropriate.



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