

# Reimagining Family Philanthropy Five Best Practices for Meaningful Engagement

For many families, the holidays provide a natural opportunity to reflect on how philanthropy fits into their shared story. Conversations often turn toward legacy, impact, gratitude and how giving can be more intentional and connected across generations.

Whether your family has an established foundation or is still exploring how to give together, the following best practices can help create a more inclusive, sustainable, and fulfilling approach.

## 1 Start With Individual Passions & Strengths

Each family member brings their own story, experiences, and talents to the table. Understanding what causes resonate with each person—and how their skills can be put to good use—creates a more personal connection to the family's giving.

For instance, one member might focus on environmental causes while another feels drawn to local education or healthcare. Someone with financial expertise can help guide grantmaking, while a younger member might contribute through social media or storytelling. Aligning giving with individual passions gives participants a sense of purpose and energizes everyone involved.

## 2 Foster Active Participation

The most effective family philanthropy is not directed from the top down—it's built from the inside out. Inviting every generation to participate in discussions and decisions encourages ownership and shared vision.

When younger family members feel their ideas are valued, they're more likely to stay engaged long-term. Consider rotating who leads annual grant discussions or setting aside a portion of funds each year earmarked for each generation to allocate toward causes that matter to them.

As advisors, we often hear familiar reflections from families who want to do more with their philanthropy but aren't sure where to begin:

*"I'd really like my children to be more involved in our charitable giving, but I'm not sure how to engage them."*

*"The next generation has different causes and organizations they're passionate about—how do we honor those interests while still staying true to our family's values?"*

*"We want to be more structured and intentional with our giving, but we don't always give it the time and attention it deserves."*

These are thoughtful, honest questions which reflect real challenges and opportunities that come with family philanthropy.



## Holiday Conversation Starters: Questions to Spark Reflection & Connection

As you gather with your family over the holidays, consider setting aside a few minutes for a conversation about gratitude and giving. Here are some simple prompts to get you started with open, meaningful dialogue:

- What are we most grateful for this year, and how could we reflect that gratitude through our giving?
- Which causes or communities have touched you personally—and how might we make a difference there together?
- How do we see our family's legacy evolving for the next generation?
- What could we do next year to make our philanthropy more intentional and impactful?

### 3 Embrace & Acknowledge Generational Differences

Generational differences in giving are both natural and valuable. Senior generations may emphasize stewardship, tradition, and long-term partnerships with trusted nonprofits, while younger generations often gravitate toward innovation, impact giving, or social entrepreneurship.

Bringing these perspectives together can spark creativity and strengthen the family's charitable outreach. Hosting a family "giving summit" or annual retreat—perhaps over the holidays—can help bridge these viewpoints and reaffirm shared values while allowing space for new ideas.

### 4 Create Flexible & Hands-on Engagement Opportunities

Each family member's availability and capacity will change over time. Younger members might prefer shorter-term volunteer opportunities or digital platforms for engagement, while others may enjoy in-depth involvement like site visits or strategic planning.

Offering a range of ways to participate helps maintain energy and engagement—and reminds everyone that there's no single "right way" to contribute and it is okay to be flexible with your level of involvement depending on your life stage and circumstances.

### 5 Seek Expert Guidance When Needed

Many families reach a point where they want to elevate their giving but aren't sure how to take the next step. Seeking proper counsel can provide clarity and direction.

For example, we've helped families design philanthropic governance structures, guide productive multi-generational conversations and align giving strategies with family values. Sometimes a neutral facilitator can make the difference between well-intended discussion and a truly transformative one.

## A Season to Reflect—and Reimagine

At its core, family philanthropy is not just about generosity, it's about connection, learning, and purpose. The holidays offer a rare pause for us to reflect on what matters most to our families and how giving can bring generations closer together.

If your family would like help facilitating a philanthropic conversation, structuring your giving strategy, or exploring new ways to involve future generations, our team at The Family Office at Synovus would be honored to guide that process and bring your family's vision to life.

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