



GENERAL  
ADVISOR &  
PARTNERSHIP

# Legacy Advisory

WEALTH | PHILANTHROPY | ESTATE

# You grow the wealth. We unlock the impact

Some advisors ask what moves you to give. What comes next is where Generous Humans begins.

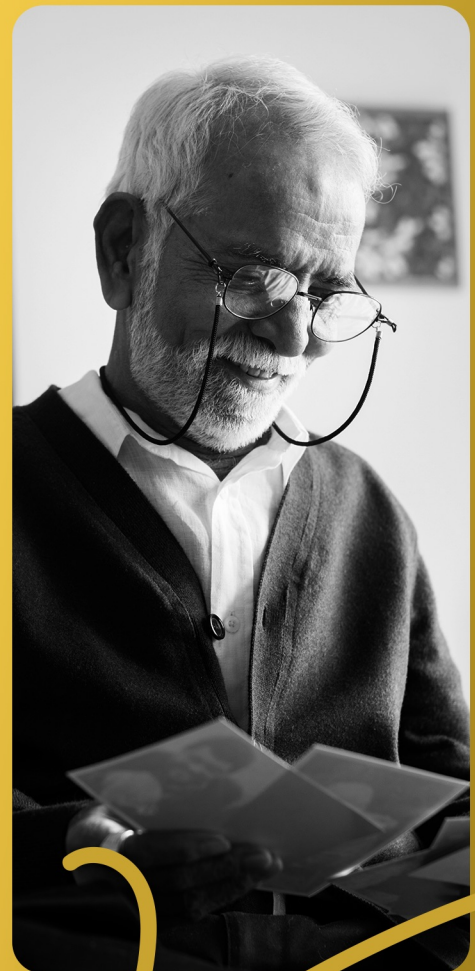
## THE GAP WE FILL

### Your clients have a number. We give them a reason.

You know their numbers. Their legacy goals. Their estate plan. But most clients have never had language for who they are as a giver. Without it, generosity stays inspirational. They care. They give when asked. They follow the tax strategy. But every decision still feels pressured, obligated, or disconnected from something they cannot quite name.

That is not a generosity problem. That is a clarity problem. And until it gets solved, your clients will never be able to recalibrate

**Generous Humans gives your client clarity before an ask is made so giving can be intentional.**



## WHAT'S INCLUDED IN EVERY SESSION

A three-session process built for the conversation your clients are waiting for.

### Discover – Values & Identity

Who your client is as a giver named out loud for the first time.

### Design – Season of Life & Capacity

Your client identifies the organizations that match who they are as a giver and builds the structure around each one. Annual gifts, multi-year pledges, project funding. Giving that has purpose.

### Activate – Generosity Blueprint

Together in the room, we build the Generosity Blueprint — a clear, identity-driven document they keep for life and return to every time a giving decision needs to be made.



## WHAT YOUR CLIENTS WALK AWAY WITH

- A named giving identity - financial and lived - that gives them language for every generosity decision going forward.
- Clarity on what motivates them, where they come alive as a giver, and what friction is keeping them from acting.
- A deeper relationship with you - because you gave them something no other advisor has.
- A document they'll share with their family, their estate attorney, and the causes they care about most.
- Confidence in every giving decision - because they finally know who they are as a giver.

# Your clients are ready for this Conversation. Let's start it.

Schedule a call and we will find the right starting point for your practice

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## GENEROUS ON PURPOSE

