

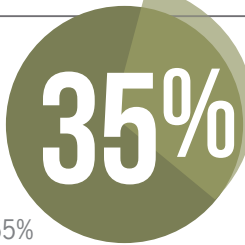
# THE 2014 U.S. TRUST®

## STUDY OF HIGH NET WORTH PHILANTHROPY



**Virtually all high net worth households donated to charity in 2013 compared to 95% in 2011.**

This high rate of giving among the wealthy compares with 65% of the general population of U.S. households who donate to charity.



**More than a third of wealthy donors plan to increase their giving in the next 3 to 5 years**

▲ UP FROM 24% IN 2012.

### 75% OF HIGH NET WORTH INDIVIDUALS VOLUNTEERED

Among those wealthy donors who volunteered:

- 59%** (6 out of 10) volunteered more than 100 hours
- 34%** volunteered more than 200 hours
- 42%** volunteered with three or more organizations
- 32%** with two organizations
- 26%** with one organization



High net worth donors who volunteered gave a higher average gift amount (\$76,572) than those who didn't volunteer (\$44,137)

**28%** The average dollar amount given to charity by wealthy donors increased by 28 percent from \$53,519 in 2011 to \$68,580

### ENGAGED DONORS: *Happier and More Generous*

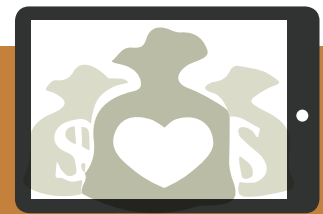
	EXPERT (14%)	KNOWLEDGEABLE (72%)	NOVICE (14%)
Monitor giving	78%	53%	29%
Confident in the impact of their giving	84%	60%	43%
Consult with an advisor	61%	46%	26%
Have or plan to use a giving vehicle	78%	57%	30%
Achieve personal fulfillment through giving	89%	75%	47%
Average amount of giving in 2013	\$150,229	\$64,599	\$19,013



# TOP 5 MOTIVATIONS FOR GIVING:

- 1 • believing their gift can make a difference [ 74% ]
- 2 • personal satisfaction [ 73% ]
- 3 • supporting the same causes annually [ 66% ]
- 4 • giving back to the community [ 63% ]
- 5 • because they serve on the nonprofit's board or volunteer for the organization [ 62% ]

During the last decade, the percentage of wealthy donors who gave online has grown dramatically, from 15% (2004-2007) to 50% (2010-2013)



90%

In nearly of high net worth households, women are either the sole decision maker or at least an equal partner in charitable decision making.\*

In heterosexual married/partnered high net worth households, nearly **three times more women than men** are the sole decision makers.



85%

## { WEALTHY DONORS GIVE TO EDUCATION

- 73% give to higher education
- 60% give to K-12 education

It is the charitable subsector supported by the largest percentage of high net worth households.

\*The 2011 Study of High Net Worth Women's Philanthropy