5 TIPS FOR CHARITY FINANCIAL PLANNING

1. BUILD LONG-TERM FINANCIAL PLANNING INTO YOUR YEARLY STRATEGY REVIEW.

2. USE THE RIGHT PEOPLE & THE RIGHT TOOLS.

3. KEEP IT SIMPLE AND AGILE – CONSIDER EXTERNAL FACTORS & BE PREPARED TO CHANGE YOUR PLANS.

4. BE OBJECTIVE - DON'T LET PASSION CLOUD YOUR JUDGMENT.

5. DOCUMENT YOUR ASSUMPTIONS.

30 ANNIVERSARY
Cranfield TRUST