

Research Formulas

Generosity Screening (GS) Giving Capacity

$(\text{RE Value} * \text{RE Factor} + \text{Lifetime Giving}) * \text{Donation Factor} * \text{Business/SEC factor}$

RE Value = Real Estate value of all the properties owned

RE Factor = 0.05 if one property, 0.1 if two properties, 0.15 if more than two properties

Lifetime Giving = Provided by the client

Donation Factor = 1 if < 100,000, 1.1 if >= 100,000, 1.15 if >= 1,000,000

Business/SEC factor = 1.1 if either Business or SEC, 1.0 if none of either

Notes:

- GS: Age is not considered because the screenings do not produce a value for age.
- EGS does consider age! The point of the EGS is to try and get all the data points that a snapshot uses but without all the digging. So, identifying age and primary residence and then estimating salary are easy ways to improve the results. We did an analysis in Jan 2025 and found that the **EGS averaged an increase of 25% from the GS.**
- Snapshots are the most thorough.

Enhanced Generosity Screening (EGS) Calcs (using spreadsheet references & explanations)

GS: $=(\text{FU2} * \text{FX2} + \text{FV2}) * \text{FY2} * \text{FW2}$

EGS: $=\text{FN2} * (\text{FL2} - 22) * 0.01 + (\text{FU2} * \text{FX2}) + (\text{FO2} * \text{FP2} * 0.05) + \text{FV2}$

EGS: = Salary/Age + Real Estate + Business value + Lifetime Giving

EGS Notes:

Salary/Age = $\text{FN2} * (\text{FL2} - 22) * 0.01$

Real Estate = $(\text{FU2} * \text{FX2})$

Business Value = $\text{FO2} * \text{FP2} * 0.05$ (Rather than a factor it gets an actual value)

Lifetime Giving: FV2

SEC is ignored

Snapshot Formula (A more finely tuned analysis than an EGS)

Snap: = (Salary/Age + Real Estate + Business value) + (Factorized +/- of the first part) + Lifetime giving

$(\text{L1} + \text{L2} + \text{L3}) + (\text{L1} + \text{L2} + \text{L3}) * \text{DIF} + \text{L4}$

Line 1: Income x (Age-22) x .01

Line 2: Total Real Estate Value x (0.05 if 1 property) or (0.1 if 2 properties) or (0.15 if more than 2 properties)

Line 3: Business Ownership (one year of business revenue) x .05

Line 4: 100% of last 5 years of gifts given to Non-Profit

DIF: Decrease/Increase Factor based on screenshot below. It takes into consideration, generosity data, real estate ownings, business ownership.

Decrease / Increase Factor [DIF=Sum of these percentages]

DECREASE

25% No demonstrated generosity
(give to 3+ philanthropic or political org's
other than the client)

10% Less than \$1M in real estate or
fewer than 3 properties

10% Employee (non-entrepreneur)

INCREASE

10% Multiple business owner (entrepreneur)

10% Proof of 6 figure gifts

15% Proof of 7 figure gifts

Snapshot Stuff

Add the following:

Line 1 (L1): Income x (Age-22) x .01

Line 2 (L2): Total Real Estate Value x (0.05 if 1 property) or (0.1 if 2 properties) or (0.15 if more than 2 properties)

Line 3 (L3): ~~Stock (actual stocks held)~~ / Business Ownership (one year of business revenue) x .05

~~Pension Value x .125~~

Line 4 (L4): 100% of last 5 years of gifts given to Non-Profit

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Home to salary calculation if we don't have a salary

1M house -> 150k salary

Formula

Giving capacity = (L1 + L2 + L3) + (L1 + L2 + L3) * DIF + L4

