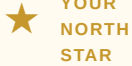


# The Whitfield Family

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*A year from now, your giving addresses root causes in education and climate through deep, well-researched partnerships with fewer organizations you trust, where your commitment is large enough to matter and long enough to see results.*

## YOUR GIVING IDENTITY

*You are systems-level givers who concentrate resources where you can see results, build relationships with leaders, and stay long enough to matter.*

You sold your company in 2023 and moved from \$50,000-\$60,000 in annual giving to over \$1 million. The resources changed but the approach hasn't fully caught up. You're still saying yes at the pace of your earlier giving, which has spread you across eleven organizations. Your highest satisfaction, 5 out of 5, goes to Pathways to Education (\$200,000), Canada Learning Code (\$150,000), and Feeding Canadian Kids (\$25,000). These share a pattern: direct contact with the work, measurable outcomes, and a personal connection to the people running the programs. James mentors through Pathways. Priya met the Pembina team at a conference and came home ready to fund their policy work. The gifts that frustrate you, MaRS (\$75,000), University of Waterloo (\$75,000), and Toronto Foundation (\$150,000), share the opposite pattern: obligation-driven, low visibility, and no sense that your contribution registered.

Priya's family story drives the core of your giving. Her mother cleaned offices at night so she could attend a good school. That lived experience of watching equally capable peers fall behind for lack of access is the reason education equity sits at the center of everything you fund. James brings operational discipline and direct engagement. His board seat at Pathways is the model for how you both want to relate to the organizations you support: close enough to understand the work, committed enough to advocate for it.

You think like founders. You look for broken systems, identify leverage points, and back teams that can execute. You want a plan that lets you say no to the gala tables and alumni calls so you can say yes with real conviction to the five or six organizations where your money, time, and reputation make a measurable difference.

## YOUR GENEROSITY STATEMENT

### Fix the system, not the symptom

Your giving targets the systems that create inequity, not just the symptoms. Education access, clean energy policy, and poverty reduction are all upstream investments.

### Fewer, deeper, bigger

Five deep partnerships will always outperform eleven shallow ones. Consolidate toward organizations where your gift is large enough to matter.

### The plan is the permission slip

A written plan is the best way to say no with confidence. Every ask gets measured against the plan, not against the emotion of the moment.

### Relationships before cheques

You want to know the executive director by name and understand the work well enough to advocate for it. Six-figure commitments earn that kind of access.

### Play the long game

Education and climate change are generational problems. Your commitments should reflect multi-year timelines, not annual renewal cycles.

### Evidence first, innovation second

Proven models that are scaling get the majority of your dollars. A smaller allocation goes to smart teams trying something new.

## YOUR GIVING BOUNDARIES

### SAY YES TO:

Your plan covers three focus areas: youth education and poverty alleviation (primarily in Toronto), and climate and environment (national and global scope). You are concentrating on roughly five to seven organizations where your gift is large enough to earn a seat at the table and a relationship with leadership. You favor proven models that measure outcomes, with a smaller allocation for innovative approaches from teams you trust. Flexible, multi-year funding is your default.

### SAY NO WITH PEACE TO:

- ✗ Gala table sponsorships and event-based asks outside your three focus areas
- ✗ Alumni giving driven by obligation rather than conviction
- ✗ Pooled funds where you cannot track how your dollars are deployed
- ✗ Organizations where your gift is too small relative to their budget to build a real relationship
- ✗ Causes outside of education, poverty alleviation, and environment, no matter how worthy
- ✗ International program funding where you have no relational connection to the team

### WHEN SOMEONE ASKS:

*Thank you for thinking of us. We put together a giving plan this year and we've already committed our budget across a few focus areas. If this fits within what we're doing, we'll follow up, but I want to be honest that we're being much more intentional about where we direct our giving now.*

## YOUR FOCUS AREAS

### PRIMARY

#### Education

- Youth education is where your giving history, personal experience, and highest satisfaction scores all converge. Pathways to Education and Canada Learning Code are already performing at 5/5, and James's direct mentoring involvement at Pathways gives you ground-level insight that most donors never get.
- This area anchors your plan. Multi-year commitments here let you move from annual donor to institutional partner, with the credibility to influence program direction and advocate publicly for these organizations.
- Priya's story of growing up in Brampton and watching equally talented peers miss out on opportunities is the emotional and strategic foundation for everything in this bucket. The goal is changing odds, not dispensing charity.

### PRIMARY

#### Poverty Alleviation

- Poverty alleviation connects directly to your education work. The children and youth you care about are often the same populations experiencing food insecurity and housing instability. Feeding Canadian Kids at \$25,000 was your most efficient dollar by your own assessment.
- This focus area gives you a place to fund the stabilizing conditions that make educational success possible. A child who eats breakfast learns better. A young person with stable housing can finish school.
- Covenant House Toronto moved both of you after a single dinner conversation. As you consolidate your giving, this area is where relational, high-impact gifts to smaller organizations can punch well above their dollar amount.

### SECONDARY

#### Environment

- Your climate and environment giving spans policy advocacy (Pembina Institute), science-based campaigning (David Suzuki Foundation), and tangible land conservation (Nature Conservancy of Canada). This is the area where your giving is most national and global in scope.
- Priya's personal connection to the Pembina team and the satisfaction of pointing at a map for Nature Conservancy suggest you want the same relational depth here that you have in education. Building that will take intentional effort over the next year.
- Climate and energy policy are generational investments with long feedback loops. Your comfort with a 10-year time horizon makes you well suited to fund the kind of systemic work that most donors find too slow to support.

## YOUR GIVING FRAMEWORK

ANNUAL GIVING **\$1,200,000**

BUCKET	AMOUNT	%	PURPOSE
<b>Youth Education &amp; Opportunity</b>	<b>\$480,000</b>	40%	Core funding for organizations that improve educational outcomes and economic mobility for children and youth, anchored by Pathways to Education and Canada Learning Code.
<b>Poverty &amp; Basic Needs</b>	<b>\$180,000</b>	15%	Direct support for organizations addressing food security and youth homelessness, including Feeding Canadian Kids and Covenant House Toronto.
<b>Climate &amp; Environment</b>	<b>\$300,000</b>	25%	Policy advocacy and land conservation work through organizations like Pembina Institute, David Suzuki Foundation, and Nature Conservancy of Canada.
<b>Innovation &amp; Exploration</b>	<b>\$120,000</b>	10%	A dedicated allocation for pilot programs, emerging organizations, or new partnerships that align with your focus areas but haven't yet earned a core commitment.
<b>Crisis &amp; Opportunity Reserve</b>	<b>\$120,000</b>	10%	A small, protected buffer for disaster response and genuinely compelling one-time opportunities that arise during the year.
<b>Total</b>	<b>\$1,200,000</b>	<b>100%</b>	

**WORTH DISCUSSING**

Three gifts scored 3 out of 5: MaRS Discovery District (\$75,000), University of Waterloo (\$75,000), and Toronto Foundation (\$150,000). In each case, you described a lack of visibility into impact or a sense that your gift didn't register at the organization's scale. These three gifts total \$300,000, which is a quarter of your current giving. Redirecting some or all of that toward your highest-conviction partners would meaningfully increase your influence at organizations where you already see results.

## CRISIS GIVING FRAMEWORK

**Priority order**

Natural disasters in Canada come first, followed by public health emergencies, then international humanitarian crises. If multiple events compete for attention, fund the one closest to home and most aligned with your long-term recovery focus.

**Early response**

Resist the urge to give in the first 48 hours. Your dollars are most valuable six months after the headlines fade, when communities are rebuilding infrastructure and restoring services. Set a personal rule: wait two weeks, then commit.

**Pre-position partners**

You mentioned the Red Cross but haven't vetted crisis-response partners the way you have your education partners. Ask your advisor to identify two to three organizations specializing in Canadian disaster recovery and one international partner. Have them ready before the next crisis hits.

**Protect the plan**

Crisis giving comes from your 10% reserve, not from your committed buckets. If a disaster exceeds that reserve, you can pull forward from next year's reserve rather than cutting a pledge to Pathways or Pembina. The plan stays intact.