

**Innovia Foundation**  
**(Your Personal Biography & Values)**

The following questionnaire is to be used as a guide for pertinent information in the establishment of your charitable fund as well as to create a permanent record of your biographical journey and philanthropic values.

**Contact Information:**

Name (as you wish to be listed): \_\_\_\_\_

Informal name or Nickname: \_\_\_\_\_ Date of birth: \_\_ / \_\_ / \_\_

Spouse/Partner Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: (home) \_\_\_\_\_ (cell) \_\_\_\_\_

E-mail: \_\_\_\_\_

Professional Advisors: \_\_\_\_\_

How long have you lived in this region?: \_\_\_\_\_

**Business Data:**

Employer: \_\_\_\_\_

Title: \_\_\_\_\_ Active or Retired?: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone/s: \_\_\_\_\_

E-mail: \_\_\_\_\_ Fax: \_\_\_\_\_

Preferred mailing method: home \_\_ work \_\_ Email preferred to Postal Mail: \_\_\_\_\_

Which work accomplishment are you most proud of?: \_\_\_\_\_

**Education:**

Schools you attended and degrees received: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Family Relationships:**

1. List the names and ages of your children: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

2. What do each of them currently do?: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. What are you most proud of about your children?: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Where did you first meet your spouse/partner?: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Tell us the most important values you learned from your parents and grandparents:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Career:**

1. How did you get into your line of work? \_\_\_\_\_

\_\_\_\_\_

2. Is that something that you always wanted to do while you were in school?: \_\_\_\_\_  
\_\_\_\_\_

**Your Personal Journey:**

1. Where were you born?: \_\_\_\_\_

2. Where do you live currently?: \_\_\_\_\_

3. What brought you to the Inland Northwest?: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Did you ever serve in any of the armed forces? If so explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. What are your interests and hobbies outside of work and family?: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Including historical figures, who do you most admire and why?: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Not including your spouse/partner, who in your lifetime has meant the most to you and why?: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Values & Philanthropy:**

1. The values and beliefs that I hold dear and that have established the bedrock for my charitable giving include: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

2. What motivated you to establish this fund?: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

3. What do you want to accomplish with this fund?: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

4. What are your long-term charitable goals and how may we help you achieve them?:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. If someone were to ask us about your fund and/or you as the donor, what would be the most important things we should communicate to them? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Often times, we like to include stories in our newsletters, brochures, annual report and/or articles, about the people who have partnered with us to start funds or the people they are honoring.

Do you give us your permission to use this information to share your story with either the above?: YES: \_\_\_\_ NO: \_\_\_\_

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_