WHITE PAPER

Becoming a Generosity Guide™

Turning Tax Law Lemons into Fundraising Lemonade

The One Big Beautiful Bill Act (OBBBA), passed in July 2025, may look like a setback for charitable giving in many ways, but it actually hands nonprofit fundraisers a rare opportunity. By introducing pain points that nudge donors away from simple cash gifts and toward more tax-efficient options — like Donor Advised Funds (DAFs) and IRA Qualified Charitable Distributions — the law pushes donors to rethink how they give. Fundraisers willing to expand their role and help donors navigate tax-smart giving stand to benefit in powerful ways.

Historically, fundraisers have relied on financial and tax advisors to initiate these conversations, with outcomes that don't always serve the donor and rarely serve the nonprofit. The Generosity Guide™ concept argues that fundraisers don't need to become financial experts to change this dynamic. As a Generosity Guide, the fundraiser can ignite generosity for their mission by helping donors navigate tax-smart giving options, bridging the conversation with their financial advisors – and converting donors into giving from wealth instead of disposable income.

This new role is surprisingly simple: be the person who connects the dots no one else is connecting. Nonprofit fundraisers are uniquely positioned to occupy a space financial advisors can't — and currently don't — because no one understands the dynamics of generosity better than the fundraiser.

Think of the Generosity Guide as a bridge connecting two landmasses that have never been linked: the world of nonprofits on one side, and the world of professional advisors on the other. Donors travel across, guided by the fundraising professional, to reach the giving strategies that serve them best.

When a fundraiser identifies herself as an informed guide rather than a financial or tax advisor, she can prepare donors to ask the right questions to optimize their charitable tax benefit and point them toward their financial advisors, who can share their own expertise and act on those conversations. The donor then works with their advisors to begin giving from wealth — and directs that generosity back to the nonprofit that started them on the journey. Research consistently shows that when donors give out of their wealth rather than their disposable income, they tend to give more generously over time.

This shift isn't only about individuals. Nonprofits can also encourage business sponsors to commit to multi-year agreements or convert charitable gifts into marketing investments, strengthening revenue stability and cementing long-term partnerships.

By positioning yourself as a Generosity Guide who helps donors and sponsors navigate these changes, you build trust, loyalty, and deeper relationships. More importantly, you create the conditions for donors to adopt new behaviors that are both tax-savvy for them and transformative for your organization.

Donor Boom's guide, **Navigating the 2025 Tax Law (OBBBA): Strategic Guidance for Nonprofits**, teaches you what you need to know about the tax law changes and puts you on solid footing to have meaningful conversations with your donors.

BECOME A GENEROSITY GUIDE — SPECIAL OPPORTUNITIES!

- It may take additional training to execute the Generosity Guide strategy with confidence. If your fundraising team would value group or 1:1 coaching sessions with Donor Boom's Founder and Principal Consultant Sari McConnell, please contact us.
- Our program materials have been condensed due to time and space limitations. There is so much more you can learn about executing the Generosity Guide strategy with confidence. Let us help you!
- Missed our program on this topic? Sign up for our newsletter where we will post future dates and keep you current on this topic.

SPECIAL NOTE

Tax-smart giving options have been around well before OBBBA existed and will very likely exist when tax laws change again. The passing of OBBBA just gives you a great opportunity to start talking about them with donors. So the Generosity Guide™ strategy should have lasting power well beyond the latest tax law.