

Additional Reading: Why Giving Makes Sense—Now More Than Ever

The following reading list is recommended.

1. **“The \$84 Trillion Wealth Transfer Is Underway”** – *Cerulli Associates*
Explains why Baby Boomers now control a once-in-history concentration of wealth—and why how it’s directed will define this generation’s legacy.
2. **“Fewer Heirs, More Wealth: Rethinking Estate Planning”** – *Wall Street Journal*
Details how smaller families and financially independent children are reshaping modern inheritance and increasing the role of purposeful giving.
3. **“Why Donating Stock Beats Giving Cash”** – *Fidelity Charitable*

Clearly shows how donating appreciated assets can significantly increase charitable impact while reducing taxes at the same time.
4. **“How Much Inheritance Is Too Much?”** – *The Atlantic*
Explores how oversized inheritances can unintentionally undermine motivation—and why many families now choose values-based giving instead.
5. **“Giving Makes You Happier—Here’s the Science”** – *Harvard Business School*
Summarizes research showing that charitable giving consistently increases fulfillment and life satisfaction, especially later in life.
6. **“Why Purpose Matters More After 60”** – *Stanford Center on Longevity*
Demonstrates how purpose-driven engagement improves emotional well-being, health, and overall quality of life in retirement years.

Visit www.purposeforward.net for more information about charitable giving