

WAYS TO GIVE:

ADMINISTRATIVE ISSUES



1. The Foundation shall not act as an executor (personal representative) for a donor's estate.
2. The Foundation may act as co-trustee on a charitable remainder trust when the trust names the Foundation as a beneficiary of 50% or more of the trust.
3. The Foundation will pay for the drafting of legal documents for a charitable remainder trust when the Foundation is named as a beneficiary of 50% or more of the trust. The donor's own counsel must review the documents at the donor's cost.

NOTE: In addition to this statement, the Alpha Gamma Rho Foundation endorses the Model Standards of Practice for Charitable Gift Planner which is attached to this Gift Acceptance Policy.



FOR MORE INFORMATION:

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