

WAYS TO GIVE:

STANDARDS OF CARE



1. The Foundation will issue written confirmation of gifts consistent with IRS guidelines.
2. The Foundation shall confirm or establish valuation, rate of payment, beneficiaries and payment schedule upon consultation with appropriate professional counsel.
3. All gift acceptance agreements shall be subject to approval of the Foundation legal counsel prior to final acceptance.
4. The Foundation shall ensure that accounting and reporting procedures shall conform to IRS requirements and shall provide the donor and/or income beneficiaries with information required by the IRS.
5. The Foundation (and appropriate directors) shall establish the investment objectives of all planned gift fund accounts and shall administer the planned gift program in a responsible and prudent manner.



FOR MORE INFORMATION:

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