



YOUR  
PARTNER  
IN PLANNED  
GIVING  
SUCCESS



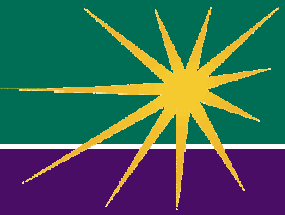
## Donor Restrictions – What Will They Think of Next?



Date: February 22, 2018

Time: 10:00 – 11:30 Pacific

Presenter: Erik Dryburgh  
Principal  
Adler & Colvin



## Agenda

- Common Donor Restrictions
- Donor Issues
- Charity Issues
- Endowment
- Documentation



## Common Gift Restrictions

- Purpose
- Endowment
- Naming Opportunity
- Investment of Gift Assets
- Administration Issues
- Restrictions on Contributed Asset



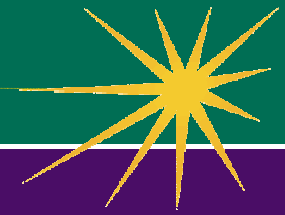
## Donor Issues

- Contribution of a Partial Interest
- Incomplete Gift
- Contingencies



## Donor Issues (continued)

- Valuation
- Gifts for a Particular Person
- Return Benefits



## Charity Issues

- Administrative Issues
- Fiduciary Duty Issues



## Charity Issues (continued)

- Substantiation Issues
- Donor Relations – Public Perception Issues



## Spending Restrictions

- What is an Endowment?
- How Much of an Endowment Can a Charity Spend?





## Releasing Restrictions

- Donor Consent
- Modification by Court / Notice to A.G.
- Old and Small Funds



## Documentation

- Gift Instrument
- Key Gift Instrument Terms



## Documentation (continued)

- Spending Rule
- Consequences of a Default
- Who Has Standing to Enforce?



# Questions?





## Still Have a Question?

Contact: Erik Dryburgh

Email: [dryburgh@adlercolvin.com](mailto:dryburgh@adlercolvin.com)

Phone: 415-421-7555