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Donor Restrictions – What Will They Think of Next?



Date: February 22, 2018
 Time: 10:00 – 11:30 Pacific
 Presenter: Erik Dryburgh
 Principal
 Adler & Colvin

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Agenda

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


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Common Gift Restrictions

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


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Donor Issues

- Contribution of a Partial Interest
- Incomplete Gift
- Contingencies


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Donor Issues (continued)

- Valuation
- Gifts for a Particular Person
- Return Benefits


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Charity Issues

- Administrative Issues
- Fiduciary Duty Issues


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Charity Issues (continued)

- Substantiation Issues
- Donor Relations – Public Perception Issues


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Spending Restrictions

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


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Releasing Restrictions

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


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Documentation

- Gift Instrument
- Key Gift Instrument Terms

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Documentation (continued)

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

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Questions?



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Still Have a Question?

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