



**Policies Outline**  
**Start Planned Giving Right**  
**Presented by**  
**John Hoskins**

**Gift Acceptance Policy**

A gift acceptance policy should contain many of the following elements:

- Purpose Statement
- Cash
- Pledges
- Publicly Traded Securities
- Closely Held Securities (Gift Review Committee should come into play with these gifts)
- Real Estate (Gift Review Committee should come into play with these gifts)
- Life Insurance
- Tangible Personal Property
- Planned Gifts
  - List the planned gifts accepted by your organization
- Endowed Funds
  - Minimum levels for select endowed funds
  - Methods to establish an endowment
    - Outright gift
    - Planned gift
- Other Naming Opportunities

**Investment Policy**

An investment policy could cover the following:

- Purpose Statement
- Endowment Management
  - Earnings
  - Distribution of earnings
  - Realized and unrealized gains
  - Spending and expense
- Investment Strategies
  - Equities
  - Fixed-income investments
  - Cash and cash equivalents
  - Other investments
  - Portfolio and total return
  - Risk tolerance
  - Diversification
  - Standards of performance
- Donor Relations
  - Working with professional advisors
  - Disclosing management fees and expenses
  - Meeting donor's expectations and not-for-profit mission