



Bequest Administration Essentials
A deep-dive for charity professionals
Fall 2026 - AGENDA

Session 1

Thursday, October 15
1:00 – 3:30 pm ET

- Introduction
 - Overview & Definitions
 - Bequest Management
 - Comprehensive outline of the steps in the administration process
 - Structure and content of Estate Accounts
 - Donor Relations
 - Gift Acceptance
 - Acknowledgement, Recognition & Stewardship
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Session 2

Thursday, October 22
1:00 – 3:30 pm ET

- Due diligence review of estate accounts
 - What should be included
 - What to look for
 - Things to consider
 - Proper expenses, costs & fees
 - Appropriate compensation
 - Acceptable requests & form of Release
 - Seeking answers: communicating concerns or questions to the Estate Trustee
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Between Sessions 2 & 3:

Independent Group Work – small groups meet to review and discuss a set of accounts

Session 3

Thursday, November 5
1:00 – 3:30 pm ET

- Review & discuss issues arising from Independent Group Work
 - Interpretation applications
 - Role of the charity
 - Charities' rights and responsibilities
 - Considering litigation
 - Factors to consider
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Session 4

Thursday, November 12
1:00 – 3:30 pm ET

- Tales from the Trenches: Panel of Practitioners
- Delays Impacting Distribution of Funds
- Ask a Lawyer