



Bequest Administration Essentials
A deep-dive for charity professionals

AGENDA

Session 1

Thursday, June 23, 2022
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

Session 2

Thursday, July 7, 2022
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

Between Sessions 2 & 3:

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

Session 3

Thursday, July 21, 2022
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

Session 4

Thursday, July 28, 2022
1:00 – 3:30 pm ET

- Trends and Emerging Issues in Estates
 - Probate planning to minimize estate costs
 - Specific vs. residual bequests
 - Executor discretion/approval for Estate gifts
 - Donor Advised Foundations
- Tales from the Trenches: Panel of Practitioners