CAGP FOUNDATION

Bequest Administration Essentials

A deep-dive for charity professionals

Fall 2023 - AGENDA

Session 1
Thursday, September 14
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, September 21
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, October 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
Session 4 Thursday, October 12 1:00 – 3:30 pm ET	• Trends and Emerging Issues in Estates • Tales from the Trenches: Panel of Practitioners