CAGP FOUNDATION

Bequest Administration Essentials
A deep-dive for charity professionals
Fall 2024 - AGENDA

Session 1
Thursday, September 19
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 26
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

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Session 3

Thursday, October 10
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 17
1:00 – 3:30 pm ET

- Trends and Emerging Issues in Estates
- Tales from the Trenches: Panel of Practitioners