

GIFT ACCEPTANCE CHECKLIST

All Gifts

_____ Delivery of property.
_____ Fund agreement in file/clear instructions on additions.
_____ Prior approval when required by form of gift.

Donor's attorney: _____ Phone: _____
Donor's accountant: _____ Phone: _____
Appraiser: _____ Phone: _____
Other professional: _____

Public Securities

Form of delivery: _____ Electronic _____ Physical
If electronic, firm and contact: _____
If physical, stock power? _____
Any restrictions on sale? If so, describe: _____

Value on date of gift: _____

Private Securities

Form of delivery: _____ Electronic _____ Physical
Form of holding: _____ C Corporation _____ S Corporation
_____ LLC _____ LLP _____ Partnership
Are there costs to the Foundation on acceptance or sale? _____
Donor's basis: _____
Are there consequences to the donor on disposition? _____
Is the asset subject to a buy-sell agreement? _____
Are there other restrictions on sale? _____
What is the likely market for sale? _____
Copy of appraisal in file: _____
Approval of gift acceptance committee: _____

Real Estate

Form of gift: _____ Outright _____ Retained Life Interest
_____ Bargain Sale _____ Testamentary
Form of ownership: _____ Sole _____ Joint/Survivor
_____ Undivided/Ten. In Common
Location: _____
Legal description in file: _____
Date of delivery of deed: _____
Appraisal in file: _____
Separate appraisal required? _____
Environmental review in file? _____ Date of
review: _____
What type of property? _____ Residential _____ Commercial
_____ Undeveloped _____ Farmland _____ Oil/gas
_____ Mineral Rights _____ Air Rights _____ Timber
Annual income from property? _____ If
commercial, provide financials from last 3 years. If
leased, provide copy of lease agreement.
Annual costs of property: _____ Insurance
_____ Maintenance _____ Property taxes
Is there debt on the property? If yes, provide copy of
current statement. Describe: _____
Are there any easements, liens, lawsuits, regulatory
designation or other restrictions on the property? If so,
please describe: _____

Has the property been offered to other charities within the
last three years? _____
Approval of gift acceptance committee: _____
Other comments: _____

Tangible Personal Property

Is the property related use or unrelated use? _____
If property is related use, are there any restrictions on use of
the item? _____
Will the property be sold on receipt? _____
If so, what is the likely market? _____
What are the costs of sale? _____
Description of object: _____
Location of object: _____
Value (appraisal in file, if available): _____
Cost of holding item (insurance, safeguarding, transport, other)
_____.