

Policies Outline
Start Planned Giving Right
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Gift Acceptance Policy

A gift acceptance policy should contain many of the following elements:

- Purpose Statement
- Cash
- Pledges
- Publicly Traded Securities
- Closely Held Securities (Gift Review Committee should come into play with these gifts)
- Real Estate (Gift Review Committee should come into play with these gifts)
- Life Insurance
- Tangible Personal Property
- Planned Gifts
 - List the planned gifts accepted by your organization
- Endowed Funds
 - Minimum levels for select endowed funds
 - Methods to establish an endowment
 - Outright gift
 - Planned gift
- Other Naming Opportunities

Investment Policy

An investment policy could cover the following:

- Purpose Statement
- Endowment Management
 - Earnings
 - Distribution of earnings
 - Realized and unrealized gains
 - Spending and expense
- Investment Strategies
 - Equities
 - Fixed-income investments
 - Cash and cash equivalents
 - Other investments
 - Portfolio and total return
 - Risk tolerance
 - Diversification
 - Standards of performance
- Donor Relations
 - Working with professional advisors
 - Disclosing management fees and expenses
 - Meeting donor's expectations and not-for-profit mission