

2022 Planned Giving Day Conference

Situations Raising Ethical Issues for Gift Planners



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and



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Scenario 1

You've developed a good relationship with a donor (age 80) who has enthusiastically supported your organization with annual gifts for several decades. He has made it clear that he has no interest in exploring planned giving options, clearly stating that providing for his children and grandchildren (whom you have never met) was his priority.

At a recent event, he told you that he had just decided that he would like to change his will to name your nonprofit as the beneficiary of a significant portion of his estate. When you visit with him to follow up on this brief conversation, you note that the donor has forgotten about your appointment, and seems a bit confused and disoriented in his own home.

How do you handle this?



Scenario 2

A woman who graduated from your University 50 years ago approaches you about her desire to commemorate this milestone with a large gift to establish a scholarship fund, which she would further support with a bequest gift. As you discuss eligibility criteria for the scholarship, she makes it clear that she wants first preference to be given to female students of Hispanic heritage.

How do you handle this?



Scenario 3

Your human services nonprofit has received several substantial donations from a family-owned clothing manufacturing company located in the same city. Recently, the company has been under fire in the press because the run-off of chemicals, dyes and other waste have been directly contaminating the local community's water supply and ecosystem. The company has aggressively disputed these findings and has continued business as usual while engaging in a complicated and lengthy court battle. Company representatives have approached you with an offer to immediately make a multi-million dollar gift to build (and name) a new state-of-the-art facility for your organization, which would greatly expand its ability to serve those in need.

How do you handle this?



Scenario 4

You've been approached by an impatient donor who wants to donate a significant amount of cryptocurrency to your organization as soon as possible. While its reputation for being associated with criminal purposes and fraudulent activities has lessened, you know that cryptocurrency values are volatile and exchanges may be vulnerable to cyber-attacks. For these reasons, experts recommend that nonprofits dispose of cryptocurrency as soon as feasible to maximize the value of the gift. However, your organization has not yet contracted with a reputable third party to take the payments via a digital wallet and convert the funds into traditional currency.

How do you handle this?



Scenario 5

Your Board Chair tells you that a longtime friend and colleague would like to donate a piece of commercial real estate to your organization this calendar year, and she is insistent that you must accept it. The property in question is an abandoned strip mall which you suspect will have environmental issues, making it both expensive to bring up to code and very difficult to sell.

How do you handle this?

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