

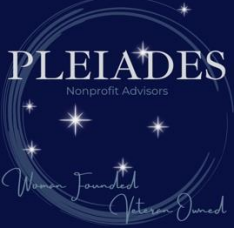
FROM ICU to BEVERLY HILLS

When Gifts and Ethics Collide

A Case Study

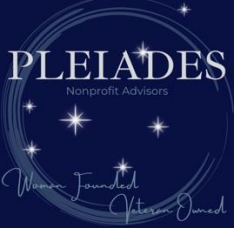
KIMBERLY JETTON, MNM, CFRE

PRESIDENT, PLEAIDES NOMPROIT
PLEAIDES NONPROFIT ADVISORS, LLC



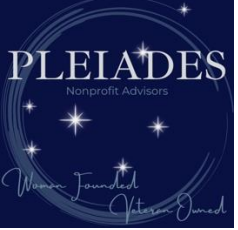
Key Ethical Considerations

- Capacity and undue influence
- Legal, financial, and ethical responsibilities
- Transparency in charitable planning
- Acting in the donor's best interests/ensuring wishes carried out



Donor Facts

- In ICU for a fall
- Age 93
- Wishes to leave her home to the church
- Asking for a CRT to fund continued care
- Widow with no children
- Sister has no interest in assisting



Visit Preparation

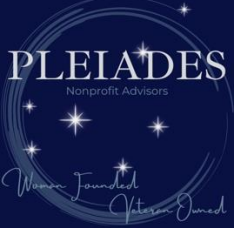
Where do I start?

Donor?



The Donor – Meet Ingeborg

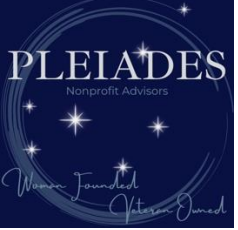




Day 1

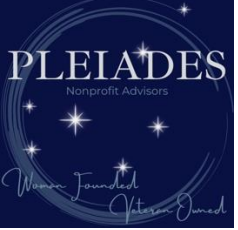
Donor is lucid and expresses wishes.

How do I proceed?



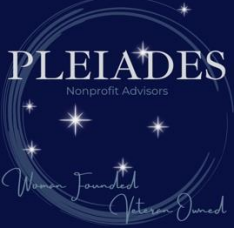
Capacity and Undue Influence

- Evaluate donor's mental capacity to make financial decisions
- Ensure decision is made freely and voluntarily
- Be cautious of external pressures (family, caregivers, charity)



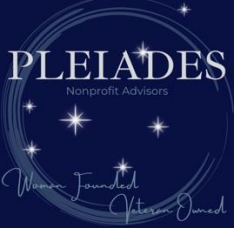
Legal & Fiduciary Responsibilities

- Planned Giving Officers should avoid providing legal or financial advice
- Donor should consult an independent attorney or advisor
- Ensure that the donor comprehends the irrevocable nature of the trust



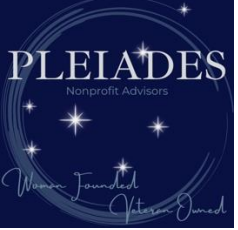
Day 2

- Bring an attorney for counsel for donor
- Discuss competency



Day 3

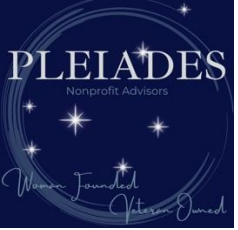
- Neighbor returns
- Competency request to medical staff



Day 4-5

Fading, competency may be at issue

What is donor's best interest?



Day 6

- Unresponsive
- No family or friend contact
- Doctor does not respond



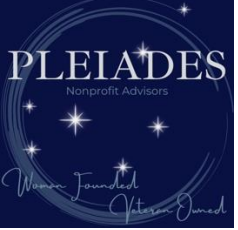
Day 7-10

- Unresponsive
- Chaplain for final blessing

Day 11

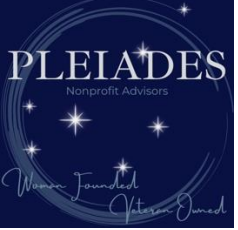
Passes away





Day 12

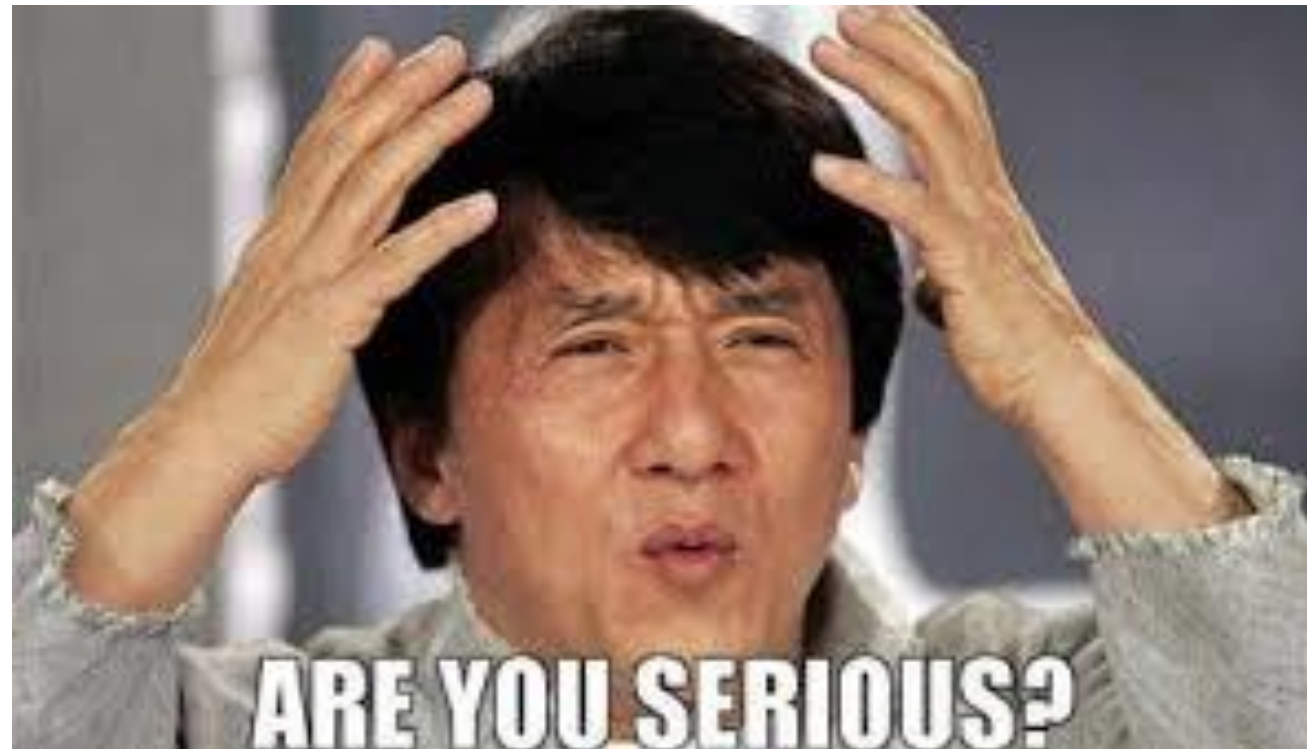
- Call from Minister
- Sister has returned
- Wants to meet with me

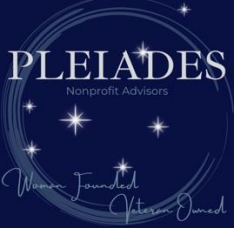


Day 13

Eagerly awaiting meeting!

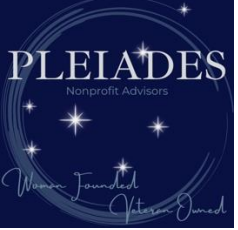
Day 13





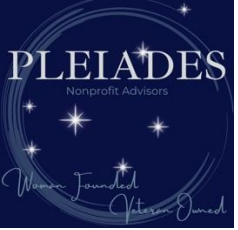
Day 16

Nephew calls



Day 16

Vladimir's attorney calls



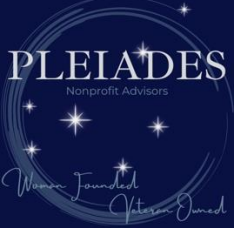
Final Thoughts

- Ethical responsibility is paramount in planned giving
- Ensure informed, voluntary decision-making
- Wishes carried out

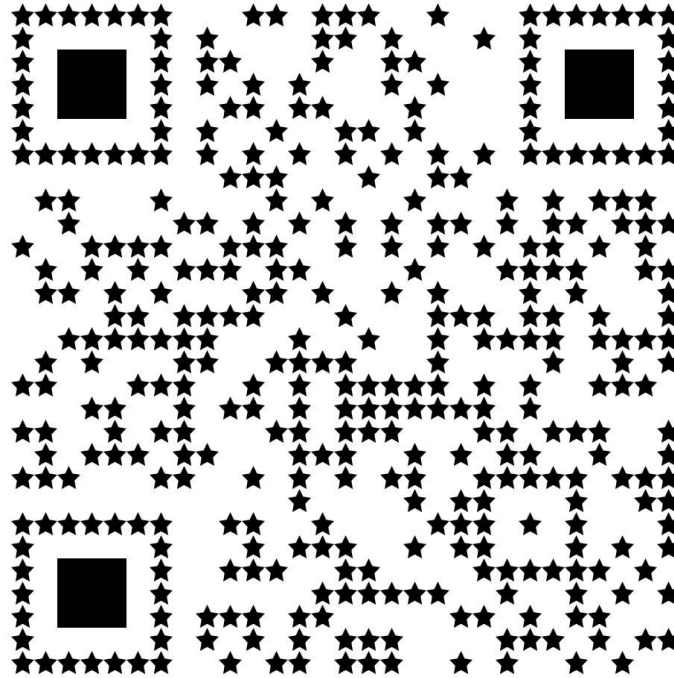
If everything goes right, we get a good experience. If everything goes wrong, we get a good story.

Seven Peaks

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Connect with Kimberly!



Thank you!