



## THE LEGACY DONOR'S BILL OF RIGHTS

Legacy giving is based on voluntary action for the common good. It is a tradition of giving and sharing that is of extreme value to the North American Jewish community. To assure that legacy giving merits the respect and trust of our most loyal donors and that they have full confidence in our organization and our ability to carry out our mission, we declare that all legacy donors have these rights:

1. To be informed of our mission, how we use after-lifetime gifts and our capacity to use these gifts for their intended purpose.
2. To feel free to ask questions when making a legacy commitment and to receive prompt and truthful and forthright answers.
3. To be informed of the identity of those serving on our board of directors and staff, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
4. To have access to our most recent financial statements.
5. To be assured their gifts will be used for the purpose for which they were given.
6. To receive appropriate acknowledgement, recognition and stewardship over the course of their lifetime.
7. To be kept informed of our organization's activities and the impact we are having on those we serve.
8. To be assured that information about their legacy commitment is handled with respect and with confidentiality to the extent provided by laws.
9. To expect that all relationships with individuals representing our organization will be professional in nature.
10. To have the opportunity to give anonymously if they so wish.
11. To have the opportunity for their names to be deleted from mailing lists that we may intend to share with others