"A Legacy Donor Dies – Now What?!"

This presentation seeks to broaden the understanding of death-related administration of estates and trusts from the point of view of a professional fiduciary, who also happens to be a recovering trust and estate attorney and a former planned giving officer. By shedding light on often complex process of death-related administration, the goal is to provide planned giving professionals and their advisors (attorneys; CPA's; financial professionals) with tools to help them advocate more effectively for their organizations, to understand better their rights and how to protect them, to fulfill their own fiduciary duties to their donors and to the public that funds them, and to enhance their ability to communicate more effectively with the executors and trustees responsible for the delivery of their charitable legacies following the death of a donor.