Meticulous stewardship of bequests is not only a meaningful way that an organization can say “thank you” to their donors but is in the best interest of the charity. This presentation will provide a step-by-step plan for how to effectively manage your organizations bequests. It will also address common questions that come up in the post-death estate administration process. What documents should be provided to the charity? What information are the beneficiaries entitled to receive? Is it safe to sign this document? Is there a way to avoid establishing the dreaded Inherited IRA? All of these questions, and more, will be answered during this session.