



PLANNED GIVING PROGRAM POLICIES AND GUIDELINES

Introduction

KUED Public Television welcomes both outright and deferred gifts. The types of deferred gifts encouraged include bequests, charitable gift annuities (immediate and deferred), charitable remainder trusts, retained life estates, gifts of insurance policies and proceeds, gifts of retirement plan assets, real property, charitable lead trusts, and other gift arrangements as the University of Utah may approve. Gifts to KUED are governed by the policies and procedures of the University of Utah.

General Policy

- I. Gifts of real estate, complicated stock gifts, and unusual gifts-in-kind must be reviewed and accepted by the University of Utah Gifts Committee before they can be received by the university. The Gifts Committee is comprised of the following university personnel:

Vice President for Development (Fred Esplin)
Assistant General Counsel and Director of Planned Giving (Jeff Paoletti)
Executive Director of Development (Tina Burton)
Vice President for Administrative Services (Arnold Combe)
Director of Research Park (Charles Evans)
Chief Investment Officer (Jonathan Shear)

- II. Donors are responsible for obtaining an independent, third-party qualified appraisal for a contribution of real property to the university valued more than \$5,000. It would be inappropriate for university personnel to appraise or evaluate such gifts for donors.

III. KUED SHALL NOT SERVE AS TRUSTEE OF CHARITABLE REMAINDER TRUSTS AND CHARITABLE LEAD TRUSTS EXCEPT WHEN IT IS IMPRACTICAL TO NAME ANOTHER TRUSTEE.

IV. OUTRIGHT GIFTS OF CASH, PUBLICLY*TRADED SECURITIES AND LIFE INSURANCE DO NOT REQUIRE APPROVAL BY THE GIFT COMMITTEE.

- V. Refer to the “Policy for the Acceptance of Real Property Gifts” for guidelines on the acceptance of real estate.

VI. KUED SHALL IN ALL CASES ENCOURAGE DONORS TO DISCUSS PROPOSED GIFTS WITH INDEPENDENT LEGAL AND/OR TAX ADVISORS OF THE DONOR'S CHOICE.