STOCK DONATION POLICY FOR [INSERT ORGANIZATION NAME]

Adopted on: _____

Prepared by: _____

Purpose

This policy outlines the process for handling donated securities to ensure compliance, transparency, and efficiency in liquidating assets and distributing proceeds.

The Investment Manager is responsible for executing this policy in accordance with applicable regulations and fiduciary standards.

Policy

Upon receipt of donated securities, the Investment Manager will take the following steps:

1. **Immediate Liquidation**
    - All donated securities will be liquidated as soon as practicable upon receipt. No securities will be held for investment purposes.
2. **Donation Receipt & Valuation**
    - The Investment Manager will provide a detailed receipt to the organization, including a description of the securities donated, the date of receipt, and the fair market value determined in accordance with IRS guidelines.
3. **Distribution of Proceeds**
    - The Investment Manager will liaise with the organization to confirm where the proceeds should be sent and ensure timely distribution.

Adoption

Adopted by the below signed:

[ORGANIZATION NAME]

Name: _____

Title: _____

Investment Manager:

Name: _____

Title: _____

Disclaimer:

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