

## Privacy Statement and Donor Bill of Rights

### Privacy Statement

All information about donors and prospective donors, including but not limited to their names, the names of their beneficiaries, the nature and amounts of their gifts, and the sizes of their estates will be kept confidential by the Foundation and its representatives, unless the donor grants permission to release such information. All requests by donors for anonymity will be honored, except to the extent that the Foundation is required by law to disclose the identity of donors.

This charity has a written donor privacy policy published on its website, which states unambiguously that (1) it will not sell, trade or share a donor's personal information with anyone else, nor send donor mailings on behalf of other organizations or (2) it will only share personal information once the donor has given the charity specific permission to do so.

### Types of Gifts

- Cash – The two simplest ways to make a gift to the Plan B Foundation is to write a check made payable to “Plan B Foundation”, or to make a credit card donation through the Foundation’s website. Credit will be given for the full amount of the gift, unless goods or services were received for all or a portion of the gift.
- Tangible personal property – Marketable personal property with no restrictions on its use or sale. Credit will be given to the giver in the amount of the cash realized from the sale.
- Securities – Gifts of securities will be acknowledged to the donor at the value received into the account, as of the day received. All securities will be sold immediately upon receipt into the account. The funds available after the sale will be invested in interest-bearing accounts of low risk, such as money market accounts, treasury notes or bills, or certificates of deposit.
- Real estate – Property encumbered by a mortgage or other indebtedness cannot normally be accepted as a gift unless the donor agrees to assume all carrying costs until the property is liquidated. Exceptions to this guideline can be made when the value of the property exceeds the anticipated exposure, or will produce income, or will be used by the Foundation in its programs.
- Life insurance – The Foundation will accept a life insurance gift if the donor contributes an existing policy or if the donor pays for a new policy. Credit will be given for the cash value of the policy on the date of the gift plus any post-gift premiums paid by the donor.
- Retirement plan beneficiary designations – The Foundation will accept retirement plan benefits, and upon the death of designee, will give credit for the amount received.



- Bequests – The Foundation will accept bequests, including those for a specific amount, for a percentage of the donor’s residual estate, or for a specific asset owned by the donor. Credit will be given for the bequest when it is received.
- Life insurance beneficiary designations – The Foundation will accept and give credit for the net proceeds of life insurance if and when it is received.
- Other – Other gifts such as charitable gift annuities, charitable remainder trusts, and charitable lead trusts will be discussed with any interested donor.

### **Donor Bill of Rights**

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization’s mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for the intended purposes.
- II. To be informed of the identity of those serving on the organization’s governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization’s most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgment and recognition.
- VI. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.
- XI. Plan B Foundation will not sell, trade or share a donor's personal information with anyone else, nor send donor mailings on behalf of other organizations.
- XII. Donor personal information will only be shared once the donor has given Plan B Foundation specific permission to do so.