



## **Midwest Center for Holocaust Education** **Gift Acceptance Policy**

**Adopted August 19, 2021**

1. The Midwest Center for Holocaust Education (MCHE) solicits and accepts gifts that are consistent with its mission, and that support its core programs and special projects. MCHE will not accept gifts that are inconsistent with its mission, purposes or priorities, or are judged too difficult to administer.
2. Donations and other forms of support will generally be accepted from individuals, partnerships, corporations, foundations, government agencies, or other entities.
3. Gifts Generally Accepted Without Review
  - a. Cash. Cash gifts are acceptable in any form, including by check, money order, credit card, or online.
  - b. Marketable Securities: Marketable securities may be transferred electronically to an MCHE account maintained at one or more brokerage firms or delivered physically with the transferor's endorsement or signed stock power (with appropriate signature guarantees) attached. All marketable securities will be sold promptly upon receipt unless otherwise directed by the Finance Committee. Where marketable securities are restricted (e.g., by applicable securities laws or the terms of the proposed gift), the decision whether to accept the restricted securities shall be made by the Finance Committee.
  - c. Bequests and Beneficiary Designations under Revocable Trusts, Life Insurance Policies, Commercial Annuities and Retirement Plans: Donors are encouraged to make bequests to MCHE under their wills, and to name MCHE as the beneficiary under trusts, life insurance policies, commercial annuities and retirement plans.
  - d. Charitable Remainder Trusts: MCHE will accept designation as a remainder beneficiary of charitable remainder trusts.

- e. Charitable Lead Trusts: MCHE will accept designation as an income beneficiary of charitable lead trusts.

#### 4. Gifts Accepted Subject to Review

Certain forms of gifts or donated property may be subject to review prior to acceptance. Examples of gifts subject to prior review include, but are not limited to:

- a. Artifacts, books, documents:

Such items may be donated to MCHE for use in education programs with the understanding that preservation is not possible. MCHE is not a museum and does not have the facilities or capacity for historic preservation. Each proposed donation will be evaluated by MCHE staff based on (i) MCHE's ability to utilize the items in educational programming and (ii) the number of similar items already in MCHE's collection.

All donations must be outright, unconditional gifts to be used at the discretion of MCHE. Title to all items donated shall be free and clear, without restriction as to use or future disposition.

The appraised value of any donation is the responsibility of the donor. No acquisition shall be appraised by MCHE.

- b. Life Insurance:

MCHE will accept gifts of life insurance where MCHE is named as both the beneficiary and the irrevocable owner of the insurance policy. The donor must agree to pay any future premiums owing on the policy.

#### 5. Gifts Which May Not Be Accepted

Examples of gifts which may not be accepted include, but are not limited to:

- a. Real Estate
- b. Original Art
- c. Artifacts or other assets that require historic preservation and/or conservation.