



## NATA Foundation Shoebox Society



### NATA Foundation Charter Membership of Shoebox Society (must have completed commitment form by December 31<sup>st</sup>, 2016)

#### Benefits:

In addition to knowing that a planned gift will benefit the NATA Foundation in the future you also have the opportunity to motivate others to make a planned gift or to designate the NATA Foundation in an estate plan. Members have the option of allowing us to highlight their planned giving commitment through:

Recognition on a plaque at the NATA office

Receiving a hard copy of the NATA Foundation 25<sup>th</sup> Anniversary History book

The gift of a commemorative pin to wear in addition to their current recognition pin

#### Current Members:

Marjorie J. Albohm, MS, ATC

Stephen E. Bair, AT Ret

Ronnie Barnes, ATC

Patsy Brown

W. David Carr, PhD, ATC and Amy Carr

Ralph Ray Castle, ATC and Katherine Castle

David E. Colt, EdD, ATC and Susan Colt

Robert T Floyd, EdD, ATC, CSCS & Lisa Floyd

Joe Gieck, AT Ret

Catherine A. Grove, PhD, ATC, LAT

Mary Susan Guyer, DPE, ATC, LAT

Mark A. Hoffman, PhD, ATC, FNATA and Laura Hoffman

Mark A. Letendre, ATC

Ken W. Locker, MA, ATC

Lindsay McLean, AT Ret

Rachael Oats, CAE

David H. Perrin, PhD, ATC

Mark S. Pfeil, AT Ret, PT & Beth Pfeil

Charles Redmond, ATC, PT, LAT

Robb Rehberg, PhD, ATC, NREMT

Kent Scriber, EdD, ATC, PT

Sandra Janine Shultz, PhD, ATC, FNATA

Michael Sitler, EdD, ATC, FNATA and Kathleen Sitler

Walter "Kip" Smith, MEd, ATC, LAT

Jeffrey A. Stone, MEd, ATC

John Phillip Vardiman, PhD, ATC and Bethany Kerr Vardiman

Michael Wilkinson, MS, ATC

#### WHAT IS THE SHOE BOX SOCIETY FOR PLANNED GIVING?

The Shoe Box Society for Planned Giving is designed to honor those who utilize estate planning to support the mission of the NATA Foundation. These commitments hearken back to the visionary pioneers that founded NATA in Kansas City in 1950. Those pioneers undoubtedly knew their efforts would benefit those who would follow them in the profession much more than themselves.

**WHO IS ELIGIBLE FOR MEMBERSHIP?**

Membership is open to those who have made a planned gift or who have designated the NATA Foundation in their estate plans. Any size commitment qualifies the individual(s) for membership.

**HOW CAN I BECOME A MEMBER?**

Inform the NATA Foundation in writing that it has been named in an estate plan through a bequest intention in a will, insurance policy, charitable gift annuity contract, estate note, trust, retirement plan beneficiary designation or other type of planned gift.

**WHO CAN I CONTACT WITH QUESTIONS AND/OR MORE INFORMATION?**

The NATA Foundation will be glad to help answer your questions about making a planned gift through the Shoe Box Society for Planned Giving. For more information about how you can become a part of this special group of NATA Foundation supporters, contact Shelley Tims, NATA Foundation Director at 972.532.8805.



## **NATA Foundation** Gift Acceptance Policy

The NATA Foundation solicits and accepts gifts for purposes that would help further the organization and fulfill its mission. The NATA Foundation urges all prospective donors to seek the assistance of personal legal and financial advisors in matters relating to their gifts, including the resulting tax and estate planning consequences. The following policies and guidelines govern acceptance of gifts made to the NATA Foundation for the benefit of any of its operations, programs or services.

*Use of legal counsel*— The NATA Foundation will seek the advice of legal counsel in matters relating to acceptance of gifts when appropriate. Review by counsel is recommended for:

- A. Gifts of securities that are subject to restrictions or buy-sell agreements.
- B. Documents naming The NATA Foundation as a trustee or requiring the NATA Foundation to act in any fiduciary capacity.
- C. Gifts requiring the NATA Foundation to assume financial or other obligations.
- D. Transactions with potential conflicts of interest.
- E. Gifts of property which may be subject to environmental or other regulatory restrictions.

*Restrictions on Gifts*— The NATA Foundation will not accept gifts that (a) would result in the NATA Foundation violating its corporate charter, (b) would result in The NATA Foundation losing its status as an IRC 501(c)(6) not-for-profit organization, (c) are too difficult or too expensive to administer in relation to their value, (d) would result in any unacceptable consequences for the NATA Foundation, or (e) are for purposes outside the NATA Foundation mission. If a donor retains a right or interest in a gift, NATA Foundation Board of Directors must determine if the gift, or type of gift, has adequate value to provide significant and appropriate benefit to NATA Foundation.

Decisions on the restrictive nature of a gift, and its acceptance or refusal, shall be made by the Finance Committee, in consultation with the NATA Foundation Director.

*Gifts Generally Accepted Without Review*—

- *Cash.* Cash gifts are acceptable in any form, including by check, money order, credit card, or on-line. Donors wishing to make a gift by credit card must provide the card type (e.g., Visa, Mastercard, American Express), card number, expiration date, and name of the card holder as it appears on the credit card.
- *Marketable Securities.* Marketable securities may be transferred electronically to an 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 NATA Foundation Finance Committee. In some cases marketable securities may be restricted, for example, by applicable securities laws or the terms of the proposed gift; in such instances the decision whether to accept the restricted securities shall be made by the Finance Committee.
- *Bequests and Beneficiary Designations under Revocable Trusts, Life Insurance Policies, Commercial Annuities and Retirement Plans.* Donors are encouraged to make bequests to the

NATA Foundation under their wills, and to name the NATA Foundation as the beneficiary under trusts, life insurance policies, commercial annuities and retirement plans.

- *Charitable Remainder Trusts.* The NATA Foundation will accept designation as a remainder beneficiary of charitable remainder trusts.
- *Charitable Lead Trusts.* The NATA Foundation will accept designation as an income beneficiary of charitable lead trusts.

*Gifts Accepted Subject to Prior Review*—Certain forms of gifts or donated properties may be subject to review prior to acceptance. Examples of gifts subject to prior review include, but are not limited to:

- *Tangible Personal Property.* The Finance Committee shall review and determine whether to accept any gifts of tangible personal property in light of the following considerations: does the property further the organization's mission? Is the property marketable? Are there any unacceptable restrictions imposed on the property? Are there any carrying costs for the property for which the organization may be responsible? Is the title/provenance of the property clear?
- *Life Insurance.* The NATA Foundation will accept gifts of life insurance where the NATA Foundation is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.
- *Real Estate.* All gifts of real estate are subject to review by the Finance Committee. Prior to acceptance of any gift of real estate other than a personal residence, the NATA Foundation shall require an initial environmental review by a qualified environmental firm. In the event that the initial review reveals a potential problem, the organization may retain a qualified environmental firm to conduct an environmental audit. Criteria for acceptance of gifts of real estate include: Is the property useful for the organization's purpose? Is the property readily marketable? Are there covenants, conditions, restrictions, easements, encumbrances, or other limitations associated with the property? Does the environmental review or audit reflect that the property is damaged or otherwise requires remediation?

The expressed intent of donors shall be respected. In the event that NATA Foundation cannot respect the wishes of a donor, every attempt will be made to negotiate an acceptable use with the donor or donor's representative; if this fails, the gift will be declined and returned.