



## **Gift Acceptance Policy**

**Junior Achievement of Southwest Florida Inc (JA of SWFL Inc) is a not for profit organization organized under the State of Florida. JA of SWFL Inc encourages the solicitation of gifts in order to enhance and further the mission and vision of the organization.**

**JA of SWFL will accept unrestricted gifts and gifts for specific programs and purposes provided that such gifts are not inconsistent with its stated mission and purpose. Gifts that are restricted will be accepted only through approval of the Investment / Gift Acceptance Committee with concurrent approval by the Board of Directors.**

**In keeping with its official gift acceptance policies, Junior Achievement of Southwest Florida Inc. may accept the following types of contributions in addition to other such gifts:**

***Cash:* Junior Achievement of Southwest Florida Inc. may accept outright cash gifts in any amount. These funds will be credited to the investment management account(s) established by the Investment Management Committee.**

***Publicly Traded Securities:* Junior Achievement of Southwest Florida Inc. may accept gifts of publicly-traded stocks and bonds at fair market values as determined under Internal Revenue Service Rules on the date the donor relinquishes control to JA of SWFL Inc. Gifts of publicly-traded securities will generally be sold as soon as possible. These funds will be credited, after commissions and expenses if any, to the investment management account(s) established by the Investment Management Committee.**

***Life Insurance Policies:* Junior Achievement of Southwest Florida Inc. may accept life insurance policies as beneficiary or gifts of paid-up policies as owner and beneficiary.**

**The Investment / Gift Acceptance Committee reserves the right of final approval of acceptance of any gift referenced above with concurrence from the Board of Directors/ Executive Committee for all gifts not referenced above. This Gift Acceptance Policy may be amended at any time through formal Board approval.**