



Lifetrack's Mission is to work together to develop the strengths within children, families and adults facing the greatest life challenges

### **Why Sponsor an In-Kind Donation Drive for Lifetrack Resources?**

#### **Why Lifetrack?**

- Lifetrack has a track history of success since 1948, including sound and prudent management of finances
- Lifetrack works to make all individuals and families strong and productive members of this community
- Lifetrack publicly recognizes the businesses, charitable organizations, and individuals that partner with us to accomplish our mission
- Lifetrack's work makes your community stronger by helping at-risk children overcome difficult circumstances to achieve their potential
- Lifetrack's work makes your community stronger by helping at-risk adults transition into doing productive work and taking responsibility for themselves and their families
- Lifetrack's work makes your community stronger by providing physical, occupational, and speech therapies on a sliding scale to help persons with disabilities develop their full potential as productive members of the community

#### **Why In-Kind Giving?**

- In-Kind donations go straight to the Lifetrack programs that need them
- In-Kind donations save time for Lifetrack staff, so they can focus on putting their skills to the best use to accomplish Lifetrack's mission
- You can get a tax deduction for In-Kind donations as well as for monetary donations
- You need to do some spring cleaning
- In-Kind giving is concrete and easy to do
- In-Kind giving gives the recipient immediate value, and it gives you an immediate connection
- You know what your donation is used for
- The gratitude of a Lifetrack adult
- The smile of a Lifetrack kid

Louise Jones  
Director of Development  
651-265-2389

[louisej@lifetrackresources.org](mailto:louisej@lifetrackresources.org)

## Helpful Hints for In-Kind Donations Drives

Dear Lifetrack Resources Partner,

We would like to start off with a heartfelt “Thank You” for your commitment to the success of the individuals that we have the opportunity to benefit as a result of this drive.

Secondly, the intent of this letter is to provide direction to help you with the success of the drive, answer some questions you may have and provide some helpful hints. With that said, let’s get started.

1. Engagement
  - a. One of the biggest success factors for a drive is employee engagement. If your team or employees understands and believes in the benefits of the drive, they will talk about it and will engage people to participate in the drive.
2. Clear communication
  - a. Post signs a week or two prior to the drive. People often want to participate but timing can become a barrier. If they know in advance, they are more likely to participate.
  - b. Have a quick kick off meeting each morning to energize employees each day during the drive. This can be as simple as a 2 minute team huddle!
  - c. Be clear on what is needed and/or acceptable for the drive. With each drive we are looking for specific items. When there is lack of clear direction, people often become confused about what is appropriate or relevant to donate to the drive. Post signs and make sure that your team is clear on appropriate donations.
  - d. Color PDF’s are available to print out in the online toolkit
3. Make it fun
  - a. Remember, this is all about benefiting the community. You may want to kick start the drive by offering employees the option to dress comfortably or wear jeans on the first couple of days should they decide to make a kick-off contribution.
  - b. Maybe you can provide preferred parking for a week to the employee who demonstrated the strongest performance with the drive.
  - c. Offer benefits to your customers for participation. Often there are options that cost your business nothing, yet offer value to the customer. Get creative.
  - d. Make it visual. For example: If it’s a book drive, display books throughout your space. Its fun, noticeable and a great conversation starter!
4. Wrap it up
  - a. At the end of the drive, contact Lifetrack for pick up. Or if you feel like visiting us to see our facilities, you are always welcome to deliver the items personally. If this is the case, just give us a call and we’ll be waiting for you!
  - b. Take pictures of the results. It’s always fun and rewarding to share what your team accomplished for the community. Plus, it is a fun driver for competition for the next year’s drive.

Following are some of the details that will help you run at full speed for a successful drive.

The following items can be found in both the hard copy and the online tool-kit:

- Color posters specific to each drive
- Copy of Lifetrack's tax exempt letter
- In kind donation receipt for tax proposes (for customers making donations)
- Donation Policy
- More in depth list of relevant donation items for each drive

Time Commitment:

Time commitment is truly minimal.

- Prep time before the drive is minimal. We recommend taking 15 minutes or so to review the online toolkit and print out the color signs for each specific drive. If you have any questions, or if you need us to print out color signs for you, please call us.
- Daily commitment. For a strong drive, we recommend 5 minutes every day to have a kick off meeting. Daily direction and energy goes a long way in staying on track.
- Wrapping it up. Should you decide to deliver the goods to Lifetrack, the time commitment may vary depending on travel time. With that said, Lifetrack is more than happy to come to you and pick up the results of the drive so that .



## **In-Kind Goods Drive Checklist**

### **Planning Your Drive**

- ☐ Contact Louise Jones, Director of Development at Lifetrack Resources, at 651-265-2389 or [louisej@lifetrackresources.org](mailto:louisej@lifetrackresources.org) to determine which in-kind goods are needed to target during the time of your drive, arrange a goods drop-off or pick-up plan, and have a receipt for in-kind charitable contributions and flyer emailed to you for the time of the drive.
- ☐ Determine one to two weeks that your in-kind goods drive will be conducted.
- ☐ Identify a team (3-5) individuals from different areas of the organization that can help to coordinate the drive in the following capacities:
  - Contact the building facilities department to make arrangements to have bins located in targeted common areas
  - Develop a drive marketing plan i.e. posters/flyers, email notification, intranet site posting, staff meeting updates, etc.
  - Print promotional materials for before and during drive
  - Print receipts for in-kind charitable contributions for drive

### **Executing Your Drive**

- ☐ Make sure to place bins and signage in your targeted areas during your designated drive time. Signage should clearly state goods being solicited, drive duration and details on Lifetrack Resources. Also, have a stack of receipts for in-kind charitable contributions available which is optional for the donor to fill-out. It is helpful to have pens and a box on-site for them to fill these out and drop-in.
- ☐ Check bins periodically to see if they are full and in need of being emptied before the end of the drive to make for more room prior to the end date.
- ☐ Continue to promote the drive activity even while it's going on.
- ☐ Confirm in-kind goods pick-up/drop-off plan with Lifetrack Resources and execute upon completion of drive.

### **Completing Your Drive**

- ☐ Ask Lifetrack Resources for a total count of items donated and report back to your organization and volunteers. Make sure to thank everyone for their participation and remember that some of the donors in your organization may be anonymous so it's best to send out a mass distribution with the impact made through your collective efforts.



## **Drive Kick-Off Sample Speech**

I would like to share with you an organization located in St. Paul that has been investing in peoples lives for more six decades.

Lifetrack Resources is a nonprofit human services organization with a mission to work together to develop the strengths within children, families and adults facing the greatest life challenges so that all families and individuals are strong, healthy and productive members of the community.

It was 1948 when Lifetrack Resources opened its doors with the name St. Paul Rehabilitation Center. Responding to community need from both the polio epidemic and injured veterans returning from WWII, the purpose was to provide physical, occupational and speech therapy services to children and adults, as well as preschool training to young children with disabilities. Lifetrack Resources was founded by the Minnesota Society for Crippled Children and Adults, the Junior League of St. Paul, the Amherst H. Wilder Charity and the Board of Directors of Family Nursing Service of St. Paul. Today Lifetrack Resources continues to provide significant value to the community, one person at a time, serving more than 9,000 children, adults and their families by helping them change their lives and create new possibilities.

Lifetrack Resources works together to develop the strengths within children, families and adults facing the greatest life challenges focusing in these two areas:

### **Child & Family Healthy Development**

These programs help at-risk children and their families achieve healthy social and emotional growth through a therapeutic preschool and home visits; assist individuals with disabilities to become more independent and provide support to parents of children who have been diagnosed as deaf or hard of hearing.

### **Employment & Economic Opportunity**

These services provide job coaching, specialized trainings, job placement, job retention and job advancement for underserved populations including adults with disabilities, individuals on government assistance and immigrants and refugees. These service and programs require tools, talents, abilities and contributions of volunteers and interns to further the achievement of these programs.

Let's show our passion to serve and support Lifetrack's mission. I would like all of us to work together as we collect, and deliver \_\_\_\_\_ to help Lifetrack meet their needs.

Please remember that we are local people helping local families. We should all feel good about what we as people and a company can provide to so many in need.

Let me read a true success story. (Read story below)

## Success Story

### *Tavi, Child & Family Healthy Development*



Tavi was referred to the Families Together Therapeutic Preschool when he was 3 years old.

Upon beginning school, Tavi was very passive, shutdown, and appeared to have retreated within himself. His teachers and therapists described him as frightened and looked at the world as a scary place. What could you expect from a child that at such a young age had witnessed more life-changing incidents than many will experience in their lifetimes?

Over the past two years his teachers have worked with Tavi and his family in the classroom and at home to help him learn to build trusting relationships with others.

Today, Tavi is a leader in the classroom and has lots of friends at school. He can often be found helping his classmates when they are having a difficult time. He has also learned to use his words to express his needs. Tavi is currently learning to write his name and takes pride in the things that he does at school. His teachers are confident that he will be ready for kindergarten in the fall!

## **Lifetrack Resources**

### **Facts at a Glance**

**Our Mission:** Work together to develop the strengths within children, families, and adults facing the greatest life challenges.

**Program and Services:** Lifetrack annually serves over 7,500 children, adults, and their families through programs and services in two focus areas.

### **Child & Family Healthy Development**

Lifetrack Resources served 4,506 adults and children in 2010 through our Child & Family Healthy Development programs.

#### **Early Childhood & Family Services**

The Families Together program at Lifetrack is the only therapeutic preschool and home visiting service in Ramsey County for children in poverty who are abused or neglected and have multiple high risk factors.

- We have preschool classrooms at both our 709 University Ave. and Eastside Community Center sites, and served 68 children in the past year with a small student/teacher ratio. It is a year round school that strives to build social/emotional and life skill competency and includes transportation and meals.
- Our home visiting program provides positive partnering skills to parents with children from birth and connects them with other community services.
- Nearly all children enrolled in our child and family programs demonstrate advancement in one or more developmental areas.

#### **Child and Adult Therapies: Creating possibilities for independence**

Lifetrack Resources is a highly respected provider of speech, physical, occupational therapies and deaf and hard of hearing services for children and adults. Services are provided at charter schools, HealthEast hospitals and at Lifetrack.

- In 2010 we assisted 961 parents of children who are deaf or hard of hearing through our Minnesota Hands & Voices program, the only resource of its kind in the state.
- Among our clients, 98 percent reported improved or maintained health and physical function.

### **Employment & Economic Opportunity**

Lifetrack Resources is a leading provider in the metropolitan area working with legal immigrants and refugees; adults and teens with mental health and physical disabilities, and parents working to move their families out of the welfare system.

- Lifetrack annually helps over 2,000 individuals make progress toward employment.
- 81 percent of clients placed in first level jobs retained employment for six months.
- Business Services served 293 job seekers with 73 percent pursued to be hired with employers providing feedback to improve the chance of hire in the future.
- CARF Accreditation was achieved for a three year period for Employment Services: Job Development, Job Supports, Job-Site Training and Employment Planning Services for People with Disabilities.
- As part of the Digital Divide Lifetrack hosts a computer lab and trainings staffed by the University of Minnesota.
- Lifetrack Resources' Innovative Packaging Solutions provides high quality packaging services to businesses while providing work experience for job seekers. Our facility is located at 341 Chester Street in St. Paul.

**About Lifetrack:** Lifetrack Resources was founded in 1948 as the St. Paul Rehabilitation Center to provide physical and occupational therapy. Based on the needs of the people we served a therapeutic preschool, employment and business services were added. Lifetrack Resources has 100 employees with an annual budget of \$8,253,000; serving clients in the metro area. Lifetrack Resources is certified by the Charities Review Council and is an EEO/AA Employer.

Updated: 07-13-11

**MAIN OFFICE:** 709 UNIVERSITY AVENUE WEST, ST. PAUL, MN 55104

Phone: (651) 227-8471 Fax: (651) 227-0621 TTY: (651) 227-3779 [www.lifetrackresources.org](http://www.lifetrackresources.org)



## **In-Kind Organizational Donors**

American Dairy Queen Corporation  
Comcast  
Free Spirit Publishing  
Hilton Minneapolis  
Innovative Office Solutions  
ITR Group  
Kowalski's – Corporate Headquarters  
Loffler Companies Inc  
Mall of America  
Merrill Lynch – Global Wealth Management  
Minnesota Life Insurance Company  
Peace Women's Ministries  
Reviva  
Sam's Club of Bloomington  
St. Alban's Church  
Sun Foods  
Shir Tikva Congregation  
Terrapin Technologies  
The Caring Tree  
The Toro Company  
Trader Joe's  
Let's Dish  
Warners' Stellan  
Chef Sam's Catering  
Cub Foods – St. Paul  
Deerwood Lane Ladie's Garage Sale  
Farmington Elementary School  
Greater Twin Cities United Way  
St Paul – Ramsey County Public Health  
University National Bank  
The Saint Paul Hotel  
Crave  
St Paul Fire Department  
Highland Nursery  
History Theatre  
Northern Vineyards Winery  
The Muddy Pig  
Sixth Chamber Used Books  
Heavy Table LLC  
Walker Art Center  
Sweatshop Health Club  
Development Department – Lifetrack Resources

The Q Kindness Café  
FastBreak Foundation  
North Aire Market  
Abdallah Candies and Gifts  
Leitner's Garden Center  
Mill City Museum  
The Southern Theater  
Penzeys Spices  
Wirtz Beverage  
MFIP/CAREER Departments – Lifetrack Resources  
One Yoga  
Guthrie Theater  
Twin Sports, Inc.  
Grand Casino Mille Lacs and Hinckley  
Bibelot Shops  
Element Consulting Group  
Child and Adult Therapies Department – Lifetrack Resources  
HR Department – Lifetrack Resources  
Shutter and Brush Photography  
Izzy's Ice Cream  
Bergin Fruit and Nut Company  
Dixie's Bar and Smokehouse Grill  
Now Bike and Fitness  
Vocational Rehabilitation Department – Lifetrack Resources  
Minnesota SOARR  
St. Paul Saints  
Gallery OKTO  
St. Clair and Snelling Jewelers  
Early Childhood and Family Programs – Lifetrack Resources  
Gold'n Treasures  
New York Kayak Company, Inc.  
Jon Charles Salon  
3M Corporation  
Everest on Grand  
Minnesota Swarm  
St Paul Police Department  
Great Harvest Bread Company  
Summit Brewing Company  
Creative Confectionaires  
Georgia's G&D Foods, Inc.  
The Tea Garden  
Mendakota Country Club  
Pool and Yacht Club  
Children's Theatre Company  
WhiteSpace Design



**Lifetrack  
Resources**

**RECEIPT FOR IN-KIND CHARITABLE CONTRIBUTIONS**

DATE:

DONOR NAME:

ADDRESS:

PHONE NUMBER:

EMAIL:

☐ Yes, I would like to be added to Lifetrack Resources' mailing list to keep updated on programs and events.

DONATION DESCRIPTION:

DONOR'S ESTIMATE OF VALUE:

PROGRAM DESTINATION:

☐ *General Agency*   ☐ *Employment & Economic Opportunity Programs*   ☐ *Early Childhood & Family Services*

**RETURN FORM WITH DONATION TO:**

**Lifetrack Resources, 709 University Ave. W., St. Paul, MN 55104**

Questions? Email [mail@lifetrackresources.org](mailto:mail@lifetrackresources.org) or call **651-227-8471**.

**Thank you for your generous contribution toward self-sufficiency for the people we serve.**

Lifetrack Resources, Inc. is a 501(c)(3) tax-exempt charitable organization. In-kind donations may be tax-deductible according to law. No goods or services were provided in exchange for your donation. Please retain this receipt for tax purposes.

**Must be signed by an employee of Lifetrack Resources to be valid:**

**Received by:** \_\_\_\_\_

[www.lifetrackresources.org](http://www.lifetrackresources.org)

**Internal Revenue Service**

**Date:** September 24, 2004

Lifetrack Resources Inc.  
709 University Avenue West  
Saint Paul, MN 55104-4804

**Department of the Treasury**  
**P. O. Box 2508**  
**Cincinnati, OH 45201**

**Person to Contact:**  
Ms. Edwards 31-07427  
Customer Service Representative  
**Toll Free Telephone Number:**  
8:00 a.m. to 6:30 p.m. EST  
877-829-5500  
**Fax Number:**  
513-263-3756  
**Federal Identification Number:**  
41-0874507

Dear Sir or Madam:

This is in response to your request of September 11, 2004, regarding your organization's tax-exempt status.

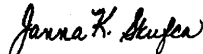
In September 1964 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under section 509(a)(2) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Janna K. Skufca, Director, TE/GE  
Customer Account Services

**LIFETRACK RESOURCES**  
**CHARITABLE GIVING PROGRAM**

**Approved by Lifetrack Resources  
Board of Directors**

# **LIFETRACK RESOURCES**

## **CHARITABLE GIVING PROGRAM POLICY**

### ***Introduction***

Lifetrack Resources seeks to offer gift opportunities for a base of support for its programs and, therefore, has established a Charitable Giving Program (the “Program”). The Program will assist donors in making gifts to Lifetrack Resources, by informing them of institutional needs and gifting opportunities, and will assist staff and other representatives in seeking and accepting those gifts by having established guidelines to follow.

### ***Enabling Policy Statement***

This Program offers an opportunity for donors to make outright gifts of cash, stock, and other property, as well as planned gifts, and for Lifetrack Resources to seek such gifts and to provide adequate staff and resources to enable the Program, as coordinated with its other funding sources.

### ***Ethical Standards***

Lifetrack Resources recognizes a dual responsibility in soliciting and accepting gifts. First, gifts received must be used prudently to achieve Lifetrack Resources’ mission. Second, Lifetrack Resources is concerned with its obligation to donors. Accordingly, Lifetrack Resources and all individuals acting on its behalf will adhere to the following principles:

### ***Donor Oriented***

We will operate the Program in accordance with high standards, including competence and integrity of staff, engagement of qualified counsel, compliance with federal and state governmental regulations, and maintenance of appropriate fiduciary controls and reports.

No high-pressure techniques will be used in contacting prospects or donors. Our purpose is to inform, serve, guide and generally assist donors in fulfilling their philanthropic wishes. No gift or gifting arrangement will be urged upon a donor at the clear expense of his or her better interest, even if this results in a smaller gift or no gift at all to us.

### ***Role of Legal Counsel and Other Advisors***

Legal counsel will be used to prepare legal documents and, as appropriate, to secure necessary approvals, prepare reports for governmental agencies, and monitor the administration of the Program.

All donor prospects will be advised in writing to consult their own attorney, accountant, or other advisors in matters relating to planned gift proposals or agreements, gifting instruments, and matters relating to estate planning or tax implications of a gift or gifting structure.

Lifetrack Resources' legal counsel will review documents solely on behalf of Lifetrack Resources. Donors will be directed to consult and engage their own legal counsel or financial advisor for the preparation of a will, trust agreement, transfer of real estate, or other exceptional gifts. Lifetrack Resources staff may **not** offer language for specifying Lifetrack Resources in wills, codicils, or other gifting instruments except in a form previously approved by Lifetrack's legal counsel. Lifetrack Resources will not serve as trustee or other named fiduciary with respect to a gifting arrangement.

### ***Role of Staff and Other Representatives***

Staff will conduct all activities undertaken on behalf of Lifetrack Resources in accordance with accepted professional standards, accuracy, truth, integrity, and in good faith. Staff and other representatives of Lifetrack Resources will exercise due caution in urging donors or prospective donors to take action. Before a gift is made each representative will provide the donor with appropriate information regarding the possible general benefits and limitations with respect to the gift. In providing such information, the representative will explain that Lifetrack Resources is not providing the donor with tax advice and that the donor should seek such advice from his or her legal counsel, accountant, or other tax advisor.

### ***Acceptance of Planned Gifts and Other Gift Restrictions***

Prior to accepting any significant planned gifts, whether outright or in trust or by bequest under a will, the terms of the gift will be reviewed by Lifetrack Resources' President (and in appropriate cases by the Chairman of the Board) and its financial staff to confirm that the gift is suitable for acceptance.

Donors have the privilege of restricting their gift to Lifetrack Resources to be used for a particular end or program. That restricted use must be consistent with the policies and purposes of Lifetrack Resources, however. No restricted use gift will be accepted which cannot be fairly reconciled to those policies and purposes.

Because of possible future changes in our mission, the donor will be asked to authorize Lifetrack Resources' Board of Directors to modify the restriction in the future should the intended use of the gift no longer be possible or practicable.

When a gift is received or anticipated, as the case may be, staff will prepare a letter expressing appreciation and, where applicable, informing the donor of the procedure for acceptance of the gift. A letter from the President, Chairman of the Board, Director of Development or other designated staff member will confirm acceptance. A personal meeting may be set up to acknowledge appreciation for the gift and to discuss other donor recognition. Lifetrack Resources will in all cases honor the donor's desire to remain anonymous.

### ***Confidential Information***

All confidential information obtained by Lifetrack Resources from or about donors or prospects will be kept private, except as required by law or as authorized by the donor. No public announcement covering a specific gift or a specific donor will be made without permission from that donor.

### ***Responsibilities for Investment of Charitable Donations***

All endowment investments will conform to the investment policies and practices established by Lifetrack Resources and its Finance Committee. Professional advisory services may be used to best achieve investment objectives.

Lifetrack Resources, with oversight of its Board of Directors, will assume responsibility for the management of all monies and properties received for investment. At least quarterly, Development staff will be provided with current information about gift income and investment status.

### ***Authorizing Planned Gifts***

The President, Vice President of Finance and Director of Development, or designee, are authorized to negotiate planned giving agreements with prospects and donors. Any agreements which do not follow the format of approved specimen agreements must be specifically submitted to legal counsel and to the Executive Committee or the Board of Directors for approval before use.

The following have authority to sign planned giving agreements on behalf of Lifetrack Resources: Two Officers of Lifetrack Resources or a single representative designated by the Board of Directors such as the President, Vice President of Finance or the Director of Development.

### ***Appraisal Procedures for Non-Cash and Non-Marketable Property***

1. The donor of a proposed gift of property must obtain an independent appraisal of the gift value of the property as required by the IRS. The donor is responsible for the valuation of the gift and its related costs including any environmental testing and appraisal fees.
2. Lifetrack Resources **may** conduct its own appraisal before accepting a gift of non-traded property.
3. Lifetrack Resources may assume the costs of environmental testing and appraisals upon approval of its Board of Directors.

### ***Other Charities***

For any trust where Lifetrack Resources is a beneficiary, Lifetrack Resources will make every effort to provide the following assistance to the donor and other beneficiaries:

1. Contact with the trustee, donor and other beneficiaries shall be made on a regular basis through the Development office.
2. In situations where Lifetrack Resources is involved with the creation of a trust managed by another charity or other person, the terms of the trust shall be reviewed by the President, Vice President of Finance and the Director of Development.
3. Periodic reports will be requested from the trustee to enable Lifetrack Resources to appropriately monitor and document trust operations and investment results.

### ***Types of Gifts Accepted by Lifetrack Resources***

- Gifts in general will be used according to each donor's intention; except as decided by the Board, unrestricted general gifts will be used for general operating purposes and unrestricted gifts from memorials or bequests will be allocated to the Board designated endowment fund.
- Outright cash gifts will be accepted including those made in cash, check, through payroll deduction or by credit card.
- Closely held stock gifts will be accepted after donor and his or her broker have received approval to sell and, as appropriate, the terms of the sale are accepted by Lifetrack Resources.

- Publicly traded stock gifts will be accepted if deposited into Lifetrack Resources' broker account and immediately sold.
- Other property gifts, such as real estate, art and equipment, will be accepted after approval of designated staff that includes the President, Vice President of Finance and Development Director. Property valued over \$5,000 requires a documented appraisal by a qualified appraiser.
- In-kind gifts will be accepted at the discretion of the Program staff or other designated staff such as President, Vice President of Finance and Director of Development. Such property worth over \$5,000 requires a documented appraisal by a qualified appraiser.

### ***Gift Acknowledgements***

1. The Information Management Specialist is responsible for official acknowledgement of gifts according to IRS and State requirements, ideally within three days of receiving the gift.
2. Program and other staff are encouraged to write an acknowledgement letter or note (without using the gift value if in-kind), and provide a copy to the Information Management Specialist.

### ***Payment of Fees***

A planned or other gift vehicle is a charitable transfer of assets for the ultimate benefit of Lifetrack Resources. Fees and expenses connected with that transfer should be generally borne by the donor. However, there are situations in which Lifetrack Resources will consider paying some or all of those expenses.

1. It is the policy of Lifetrack Resources not to pay finders' fees for planned or other gifts.
2. Lifetrack Resources may, if it deems appropriate, pay reasonable fees for a qualified appraisal of property used to fund a planned gift or gift of property.
3. If a planned gift is proposed to Lifetrack Resources by a licensed real estate or securities broker, Lifetrack Resources will consider a request to name that broker as broker of record, subject to the recommendations of the President, Vice President of Finance, Director of Development and the approval of Lifetrack Resources Board of Directors.

### ***Director of Development***

Contact the Lifetrack Resources Director of Development if you have questions about these guidelines or how donors can financially support Lifetrack Resources' mission.

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**These guidelines and procedures are subject to change by Lifetrack Resources. They are not intended to give, and should not be interpreted as giving, legal or tax advice.**