

1 **GEORGIA STATE UNIVERSITY FOUNDATION, INC.**

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3 **Procedure number/name:** 2.4b Charitable Gift Annuity Agreement Execution
4 Procedure

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6 **Issuing date:** 12/15/2008 **Effective date:** 1/1/2009

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8 **Related policy number/name:** 2.4 Gift Acceptance Policy, Title IV, Planned Giving

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10 **Procedures Approved by:** President of the foundation

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12 **I. Introduction**

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14 The Gift Acceptance Policy, Title IV, Planned Giving provides that “The
15 president of the foundation (or any officer designated by the president) may
16 execute CGA [charitable gift annuity] contracts on behalf of the foundation.”
17 This document updates the procedure after the triennial review of the gift
18 acceptance policy and changes in the bylaws.

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20 **II. Revision history**

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22 Originally approved by the president of the foundation as Procedure on
23 Execution and Attestation of Charitable Gift Annuity Agreements on
24 8/2/2006.

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26 **III. Definitions**

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28 None.

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30 **IV. Persons affected**

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32 Director of gift planning, president of the foundation, assistant
33 treasurer/chief financial officer of the foundation, finance and accounting
34 staff, donors, fiscal agent for gift annuities

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36 **V. Roles and responsibilities**

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38 See Procedures below.

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VI. Procedures

- A. Execution. The president or assistant treasurer (chief financial officer) of the foundation may execute CGA agreements on behalf of the foundation.
- B. Attestation. Consistent with the Gift Acceptance Policy, “An appropriate witness shall attest to the officer’s signature.”
- C. Additions/deletions. The president of the foundation retains the right to add or delete officers from this listing by name or title.
- D. Review. This procedure is subject to annual review.

HELP

People to contact

Position Title	Campus Location	Phone Number	Email Address
Director of gift planning	742 1PP	3-3414	cbeckoff@gsu.edu

Additional information and resources

- 2.4 Gift Acceptance Policy, Title IV, Planned Giving
- 2.4b Gift Annuity Establishment Procedure