

Plane Wellness Gift Acceptance Policy

Purpose of this Policy

The Board of Directors of Plane Wellness, its staff and volunteers solicit current and deferred gifts from individuals, corporations and foundations to secure the future growth and advance the mission of the organization. This policy governs the acceptance of gifts by Plane Wellness and provides guidance to prospective donors and their advisors when making gifts to Plane Wellness. The provisions of this policy shall apply to all gifts received by Plane Wellness for any of its programs or services. Plane Wellness reserves the right to refuse a gift if it is determined to be in conflict with the organization's mission and/or acceptance of which can do possible harm to the organization's brand and reputation.

Use of Legal Counsel and Other Advisors

Plane Wellness urges all prospective donors to seek the assistance of personal legal and financial advisors in matters relating to their significant gifts and any resulting tax and estate planning consequences.

Plane Wellness shall seek the advice of legal counsel in matters relating to acceptance of gifts when appropriate.

Restrictions on Gifts

Plane Wellness will accept unrestricted gifts, and gifts for specific programs and purposes, provided that such gifts are not inconsistent with its mission, purposes and priorities and the acceptance of which does not have the potential to harm the organization's brand and reputation.

All gifts of less than \$5,000 will be considered unrestricted except in specific instances at the discretion of Plane Wellness. Donor requests for how a contribution less than \$5,000 will be used, including requests made via a DAF, may be considered to better understand the donor's interest in Plane Wellness's services, but will not determine how their specific funds will be used and Plane Wellness will not be obligated to track and report on precise use of the funding.

Plane Wellness will not accept gifts that are too restrictive in purpose. Gifts that are too restrictive are those that violate the terms of the corporate charter, gifts that are too difficult to administer, or gifts that are for purposes outside the organization's mission. If the Plane Wellness senior management team determines that a gift may be controversial or problematic in some way that should require Board involvement, the Board of Directors will be contacted for guidance.

Types of Gifts

Charitable gifts are frequently given to Plane Wellness due to the nature of the organization.

Refunds

Refunds of donations to Plane Wellness are available upon request within 30 days of processing the gift.

Acceptable gifts are as follows:

1. Cash donations
2. Tangible Personal Property
3. Securities
4. Real Estate
5. Life Insurance Policies
6. Charitable Gift Annuities
7. Charitable Remainder Trusts
8. Charitable Lead Trusts
9. Retirement Plan Beneficiary Designations
10. Bequests
11. Life Insurance Beneficiary Designations

Gifts Generally Accepted Without Review:

- Cash. Cash gifts are acceptable in any form, including by check, money order, or online credit card donations given via Zeffy, PayPal, Stripe, etc.
- 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 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.
- Charitable Lead Trusts. Plane Wellness will accept designation as an income beneficiary of charitable lead trusts.
- Charitable Remainder Trusts. Plane Wellness will accept designation as a remainder beneficiary of charitable remainder trusts.
- Bequests and Beneficiary Designations under Revocable Trusts, Life Insurance Policies, Commercial Annuities and Retirement Plans. Donors are encouraged to make bequests to Plane Wellness under their wills, and to name Plane Wellness as the beneficiary under trusts, life insurance policies, commercial annuities and retirement plans.

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 CEO 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?

- Real Estate. All gifts of real estate are subject to review by the Board of Directors. Prior to acceptance of any gift of real estate other than a personal residence, Plane Wellness 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 purposes? Is the property readily marketable? Are there covenants, conditions, restrictions, reservations, easements, encumbrances or other limitations associated with the property? Are there carrying costs (including insurance, property taxes, mortgages, notes, or the like) or maintenance expenses associated with the property? Does the environmental review or audit reflect that the property is damaged or otherwise requires remediation?
- Life Insurance Policies. Plane Wellness will accept gifts of life insurance policies once it has been ascertained Plane Wellness 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. If the donor does not elect to make gifts to cover premium payments on the life insurance policy, Plane Wellness may:
 - Continue to pay the premiums
 - Convert the policy to paid up insurance, or
 - Surrender the policy for its current cash value

Adopted 1/6/2026