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3

### PG Calc FAILURE TO PROVIDE REQUESTED INFO

- Know who you are dealing with attorney/ professional trustee v. individual executor/trustee.
- Give them options to make it easier.
- Explain why you need what you are asking for (audit requirements, etc.).
- Cite the statute giving you your rights.
- Do NOT sign receipts or waivers or deposit a final distribution check until you get what you want.
- "But none of the OTHER charities are asking for this." Yes, they are.





PG Calc

#### YOUR PARTNER IN PLANNED SUCCESS UNWANTED ASSETS

- Worthless/Liability Carrying Assets (timeshares, cemetery plots, vacant lots): Disclaim, Disclaim, Disclaim.
- Real Estate: Sale to Neighbors / Courthouse Auctions.
- Oil/Gas Royalty Interests: EnergyNet.Com, Highground Advisors, and similar services.
- Tangible Personal Property: E-Bay, E-Bay dealers, Facebook marketplace, & event auction.
- Pawn it off on someone else.
- Avoid fractional interests / co-ownership.

7

4/24/2025



# PG Calc EXCESSIVE OR HIGH FEES EXCESSIVE OR HIGH FEES Types: attorney fees, executor commissions, trustee fees, caretaker fees, etc. Know the statutory & customary rates for your state/region.

- Ask for documentation of hourly billing and tasks done.
- Complain (but do a cost-benefit analysis first is it worth it).
- The all-time best excessive fee story ever.

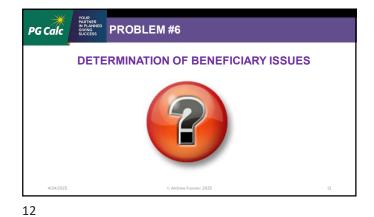
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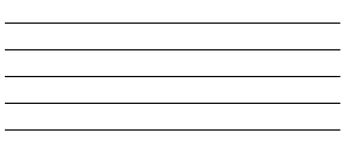


10

### PG Calc PURER BUCKS WILL & TRUST CONTESTS

- Categories: undue influence and lack of testamentary capacity.
- Get an attorney but settle.
- Know the parties, the stakes, and how everyone is going to get paid.
- Keep in mind you are almost always the "good guy" as the charity.
- The longer money is tied up, the itchier non-charities will get to settle.
- It's (almost) always the nephew.



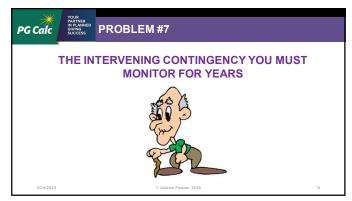


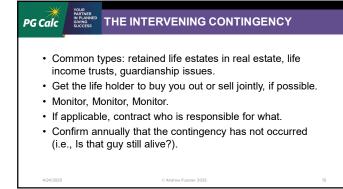
PG Calc DETERMINATION OF BENEFICIARY ISSUES
Most popular flavors: (1) the misnamed charity and (2) successor-in-interest/merger problem
Keep a history of cases accepted under other names; especially if a court has entered a ruling on validity; create an affidavit in support.

- Keep merger paperwork handy and organized.
- Know your prior addresses.
- Know your competition (sound-alike orgs).
- Level of response required.

13

4/24/2025





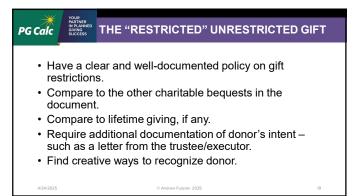


16

### PG Calc BARNED AFTER-DISCOVERED ASSETS

- In general, routinely check unclaimed property websites (for states you operate in) under your charity's name and <u>variations</u> thereof (MissingMoney.com).
- During an open estate, check unclaimed property websites for the decedent's name.
- Negotiate fee rates with asset recovery services. Play the charity card.







## PG Calc VOUR REPAINED SUCCESS THE SPECIAL REQUEST

- Examples: the heir in need, donating to a memorial, unique "final" costs.
- Private benefit "The IRS will not let me."
- Create a united front with the other charitable beneficiaries and speak with one voice.
- Find a way to recognize within your organization that does not affect your bottom line.

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• As always, do a cost-benefit analysis.

21

4/24/2025

PG Calc	FINAL POINTS WORTH RI	EMEMBERING
beneficiary have the sa	e you are a charitable does not mean you do not me rights (and ies) as any other type of	RIP
wishes are p ever make y have bestow	the deceased donor's properly honored does not you ungrateful for the gift they ved upon your organization – u are honoring their last	99999
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