

WAC 256-30-070 Deferred gifts. (1) The society welcomes and encourages deferred gifts such as:

- (a) Charitable remainder trusts;
- (b) Charitable lead trusts; and
- (c) Testamentary bequests.

(2) Society trustees and staff members shall not serve as an executor (personal representative) for a donor's estate.

(3) Society trustees and staff members shall not serve as trustee or co-trustee on a charitable remainder trust or a charitable lead trust.

(4) If planned gift illustrations or sample documents are provided to donors, they shall be provided free of charge and shall include the following disclaimer:

"The eastern Washington state historical society, northwest museum of arts and culture, strongly urges that you consult with your attorney, financial and/or tax advisor to review and approve this complimentary information. This information in no way constitutes advice. We will gladly work with your independent advisors to assist in any way we can."

[Statutory Authority: Chapter 27.34 RCW, RCW 42.56.040, 27.34.070, and 43.21C.120. WSR 17-07-057, § 256-30-070, filed 3/11/17, effective 4/11/17.]