



CONFIDENTIALITY POLICY

Adopted by the Nebraska Community Foundation Board of Directors

August 13, 2004

Amended February 10, 2006

The free flow of information between the Nebraska Community Foundation and the individual donor is a key ingredient of successful endowment building within the Nebraska Community Foundation. It is absolutely necessary that the prospective client/donor feel comfortable in discussing his or her charitable or philanthropic needs with staff, individual board members, or other representatives of the foundation. Disclosure of financial, tax or other matters of a personal nature often occurs during the process of determining how the Nebraska Community Foundation can best serve the client/donor. Moreover, a donor may wish to remain anonymous or not to have his or her gift publicly acknowledged.

The Nebraska Community Foundation will adhere to the donor's wishes regarding publicity or anonymity of a gift. This policy includes the foundation's recognition that it should hold inviolate confidential information concerning the donor. This policy will enhance the professional reputation of the foundation and facilitate the information exchange necessary to promote planned giving. Accordingly, staff members, officers, board members, affiliated fund advisory committee members and other representatives of the Nebraska Community Foundation will adhere to the following policy regarding confidential information:

- A. Each donor should be advised that acknowledgment of the donor's name and the general nature of the donor's gift or fund will appear in official foundation publications unless the donor specifies that the gift is to remain anonymous.
- B. The Nebraska Community Foundation will use its best efforts to comply with the donor's wishes concerning publicity or anonymity respecting gifts to the foundation.
- C. Staff members, officers, board members, and other representatives of the Nebraska Community Foundation should not reveal any information relating to a prospective donor's dealing with the foundation without the donor's consent.
- D. Financial, tax or personal information relating to a past donor or prospective donor shall remain confidential within the Nebraska Community Foundation. Such information, including addresses and demographic information shall not be disclosed to third parties without the donor's consent.
- E. The foundation shall not release to third parties or allow third parties to copy, inspect or otherwise use information compiled by the Nebraska Community Foundation concerning identification of a donor or donor's gifts.

These policies shall not be construed in any manner so as to prevent the Nebraska Community Foundation from disclosing information to taxing authorities or other government agencies or courts having regulatory control or jurisdiction over the foundation. However, the foundation reserves the right to consult with legal counsel of its choice in the event of such a request.

Acceptance of Confidentiality Policy

I understand the responsibilities and obligations of the Nebraska Community Foundation's Confidentiality Policy and hereby pledge to adhere to those policies.

Signature and Printed Name

Date

- Nebraska Community Foundation Board Member
- Nebraska Community Foundation Staff Member
- Nebraska Community Foundation Consultant or other (specify) _____
- Affiliated Fund Advisory Committee – our Fund Advisory Committee has discussed the NCF Confidentiality Policy on _____ (enter date) and agrees to adhere to the Policy. (The FAC shall discuss the Policy annually and retain this document in its records.)