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TO: Department and Chapter Commanders and Adjutants
FROM: J. Marc Burgess, National Adjutant
DATE: February 7, 2023
SUBJECT: Bequest Reporting Program

Since the inception of the Bequest Reporting Program (“Program”) in October 2020, DAV National has worked diligently and in conjunction with the chapters and departments across the country to ensure funds left by a decedent are distributed to the correct entity. While we have no doubt the Program will continue to be successful, we also understand as leadership changes hands, it is a good practice to revisit processes and procedures. Therefore, with a new year upon us, we wanted to take opportunity to provide a brief refresher on the Program.

Hopefully, by now, everyone is well aware of their obligations. For those of you unfamiliar with this Program, please know it is a simple and straightforward process. When chapters and departments receive notification or correspondence regarding any bequest-type gift (will, trust, insurance policy, IRA, etc.), we ask that you send an image of any paperwork that you have received to a special dedicated email address: giftintent@dav.org. If the paperwork contains a copy of the will, or trust, it will be a routine matter for our staff to confirm the correct recipient of the gift. If those documents are missing, we will work with the chapter or department in securing the documents.

We believe the Program’s continued success is dependent on certain understandings between the DAV chapters and departments and the national organization. First and foremost, under no circumstances is DAV National interested in “taking” gifts that do not belong to it. DAV National has been and continues to be in the forefront of charitable bequest management. The care and attention that we have for all of our donors, living or deceased, plays an important role in our fundraising efforts. For that reason, it is imperative that we minimize the risk of misdirected bequests, which have the potential to frustrate a donor’s purpose.

Second, we wish to assure all departments and chapters that we will continue to notify them of any bequests intended, in whole or in part, for local DAV entities but mistakenly directed to DAV National. Over the past decade, we have rerouted millions of bequest dollars to local DAV entities, always in the service of donor intent.

Third, acting proactively in notifying DAV National is in your best interest. We rely largely on the “honor system” for compliance with this Program. We do review gifts received by chapters and departments disclosed on their Annual Financial Reports, and we will reach out to you if we identify unreported gifts. However, this may occur several months after the chapter or department has received a monetary distribution. Under such circumstances, the chapter or department may have already spent the funds and is now in a position where it has to pay back the national organization.

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