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TO: Line Officers
National Executive Committee
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Department Commanders and Adjutants
Chapter Commanders and Adjutants

FROM: Barry A. Jesinoski, National Adjutant

DATE: March 7, 2025

SUBJECT: DAV Bequest Reporting Program

One of DAV's unique strengths is its effective utilization of the tripartite structure of National, Departments and Chapters. Over a century, we've been able to develop an internal balance that facilitates the execution of different aspects of our mission by the organization most equipped to meet a particular need of those we serve. In short, our organizational structure is a key part of what makes DAV great.

No benefit exists without a burden and the multiplicity of DAV "activity centers" is no exception. To many folks, our three-part structure is an insoluble mystery. For them, DAV is DAV. True as that may be, lack of attention to the differences between the organizational members of the DAV family can lead to significant problems. Nowhere is this more evident than in the area of bequests and other "testamentary" gifts like IRAs, bank accounts and life insurance policies.

For several years now, DAV National has been making great efforts to ensure that all bequests are distributed pursuant to the donor's intent with the advent of the DAV Bequest Reporting Program in 2020. When it comes to administration of charitable bequests, there is no principle more sacred than **fidelity to the donor's wishes**. Ignoring those wishes by permitting a gift to go to the wrong party is unethical and goes against DAV values.

DAV has been in the forefront of charitable bequest management for several years. The care and attention that we have for all of our donors, living or deceased, plays an important role in our continued fundraising success. For that reason, it is imperative that we minimize the risk of misdirected bequests, which have the potential to frustrate a donor's purpose.

This memorandum serves as a reminder of the process for DAV Bequest Reporting Program, which sets forth the practice by which departments and chapters shall promptly inform the national organization whenever there is notification of a new bequest. Enclosed are the applicable instructions. As you will see, the process is simple. We ask that you send an image of any paperwork that you have received to legaldepartment@dav.org. Please note, we are discontinuing the use of giftintent@dav.org. We have also included some general guidelines we follow in reviewing the testamentary language.

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, our professional legal team will work with you and representatives of the estate in obtaining the relevant documents.

Please remember that the only purpose of this undertaking is to ensure that the donor's wishes are honored. The National Organization has no intention of claiming any interest in bequests to which it is not entitled.

Occasionally, a bequest designation will be ambiguous. In those cases, the National Organization will assist the affected parties in working out a compromise. For example, suppose that a gift is left to "the DAV location in CITY, STATE." Suppose further that in the city, there are two chapters and the department headquarters. Clearly, in such a circumstance, a rational division must occur.

Please remember that nothing in the policy changes anything in respect to the Annual Financial Report. Any bequest revenue received is still required to be reflected on that document.

A handwritten signature in blue ink, appearing to read "Barry A. Jesinoski".

Barry A. Jesinoski
National Adjutant