

## Gifts, Gratuities and Bequests

**THIS POLICY**

Policy Number: 806  
Effective Date: 11/01/02  
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**REPLACES POLICY**

Policy Number: 806  
Effective Date: 10/01/93

**POLICY:**

Wesley Woods Senior Living, Inc., officers, employees and volunteers, may not accept gift/gratuities from patients, residents, their family members, visitors or vendors where such gifts/gratuities have more than a nominal value. Wesley Woods Senior Living, Inc., officers, employees and volunteers may not act in any legal capacity or on behalf of patients or residents. This policy also applies to all representatives of Wesley Woods Senior Living, Inc. In cases where a legal or family relationship exists prior to the patient or residents' admittance to a Wesley Woods Facility, disclosure must be made to the office of the President before being admitted.

**GUIDELINES:**

1. Acceptance of gifts, gratuities, or bequests regardless of the value is not acceptable if the donor expects the officer or employee to render more favorable treatment from the corporation that would be normally extended or for other reasons.
2. Money or property bequests must also be declined. Employees are discouraged from being executors and referrals for donations should be made to the Foundation of Wesley Woods Senior Living, Inc. However, if a residents or patient requests an executor, and approved list of outside executors is available for individuals interested in making a bequest through the Office of the Chief Financial Officer.
3. Examples of gifts and gratuities may include: Checks, money orders, gift certificates, securities, food, event tickets, personal items, vehicles, etc.
4. Failure to follow any of these guidelines will result in disciplinary action, up to and including termination.

Approved By: Kenneth Weber, President/CEO, Wesley Woods Inc.

Margaret Bloomquist, Associate Administrator, Wesley Woods Human Resources

Last Date Reviewed: 09/01/07 Revised: 02/28/2005 Adair Maller, Director Human Resources