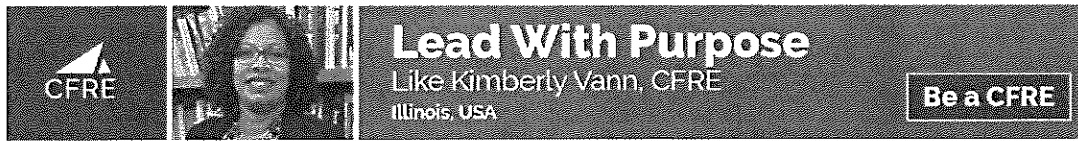


Code of Ethical Standards



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The updated AFP Code of Ethical Standards, Board approved in December 2023, is now enforceable.

All AFP members are required to sign the Code of Ethical Standards.

Ethical Standards (Adopted 1964; amended Oct 2014, Dec 2023)

Introduction: Our Commitment to Ethical and Effective Fundraising

The Association of Fundraising Professionals (AFP) is a professional organization whose members believe that philanthropy and fundraising are important aspects of our lives in society. AFP exists to foster the development and growth of both fundraising professionals and the profession itself and to promote high ethical behavior in fundraising practices. The AFP Code of Ethics and its Standards of Ethical Practice inform and govern the behavior of members and are designed to be applied alongside AFP's commitments to [member fair behavior practices \(/member-code-conduct\)](#) and [IDEA \(/initiatives/afp-idea-inclusion-diversity-equity-access\)](#) (Inclusion, diversity, equity and access).

The Code and Standards have a dual focus: (1) the duties of fundraisers to the organizations and communities they serve and to the donors who support those missions; and (2) the duties of fundraisers in relation to others in the profession and to the wider public.

This Code guides those practicing fundraising (individuals and organizations), and also applies to business members as they support fundraising practices.

The AFP Code of Ethics governs AFP individuals, organizations, and business members to:

- Practice their profession with integrity, honesty, truthfulness, and adherence to the absolute obligation to safeguard the public trust.
- Act according to the highest goals and vision of their organizations, professions, clients, and consciences.
- Put philanthropic mission above personal gain.
- Inspire others through their own sense of dedication and higher purpose.
- Improve their professional knowledge and skills, so their performance will better serve others.
- Demonstrate concern for the interests and well-being of individuals affected by their actions.
- Value the privacy, freedom of choice and interests of all those affected by their actions.
- Foster cultural diversity and pluralistic values, treating all people with dignity and respect.

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- Affirm, through personal giving, a commitment to philanthropy and its role in society.
- Adhere to the spirit as well as the letter of all applicable laws and regulations.
- Avoid even the appearance of any criminal offense or professional misconduct.
- Bring credit to the fundraising profession by their public demeanor.
- Encourage colleagues to embrace and practice these ethical principles and standards.
- Be aware of the codes of ethics shared by other professional organizations that serve philanthropy.

Public Trust and Transparency

Fundraisers secure philanthropic support for organizations whose missions respond to community needs and aspirations.

We earn the trust of the public for our work — and ensure its effectiveness — by adhering to the highest standards of integrity, honesty, and respect. In accordance, members are expected to:

1. Not engage in activities that harm the members' organizations, clients, or profession or knowingly brings the profession into disrepute.
2. Comply with all applicable local, regional, and national laws and regulations.
3. Recognize their individual boundaries of professional competence and responsibility.
4. Convey information about programs, products, services, and mission-delivered solutions without misrepresentation.
5. Establish the purpose and scope of work at the beginning of any contractual relationship.
6. Refrain from knowingly infringing on the intellectual property rights of other parties.
7. Abstain from disparaging competitors.
8. When stating fundraising results, use accurate and consistent accounting methods that conform to the relevant guidelines adopted by the appropriate authority.

Conflicts of Interest

Potential or actual conflicts of interest can undermine confidence in members, their organizations, and professions. In accordance, members are expected to:

9. Avoid activities that conflict with or may conflict with their fiduciary, ethical and legal obligations to their organizations, clients or professions.
10. Disclose all potential and actual conflicts of interest. Such disclosure does not preclude or imply ethical impropriety.
11. Decline personal benefits such as invitations or personal gifts that arise as a result of relationships with donors, prospects, volunteers, or clients.

Solicitation & Stewardship of Philanthropic Funds

The solicitation, receipt and stewardship of donations must fulfill the organizations' promise to donors and should be handled with the utmost care and consideration. Honoring donors' wishes is core to the work fundraisers do on behalf of their organizations. In accordance, members are expected to:

12. Ensure all development marketing and communications are accurate.
13. Ensure donors receive informed, accurate and ethical information about the value and tax implications of contributions.
14. Affirm their primary responsibilities are to their organizations while also safeguarding the interests of donors.
15. Ensure contributions are used in accordance with donor intent and restrictions.
16. Ensure proper stewardship of donations, including timely reports on the use and management of the funds.
17. Obtain explicit consent from donors, donors' successors, or appropriate legal counsel before altering the conditions of previously restricted financial transactions.
18. Meet the legal requirements for the disbursement of funds received from donors on behalf of nonprofit clients.

Donor Privacy

Giving is a personal choice. In relationships with donors, fundraisers have access to information about individuals and their giving that they must respect. Organizations have an obligation to ensure donors' rights to privacy. This includes but is not limited to data protection standards and list management practices. In accordance, members are expected to:

19. Protect from disclosure confidential information to unauthorized parties as defined by an organization's policies and procedures.
20. Recognize information created on behalf of an organization, including donor and prospect information, is the confidential intellectual property of that organization and may not be taken, shared with, or transferred to other entities.
21. Convey to donors and clients that they can request omission of personal information from future organizational use.
22. Convey to donors and clients that they can request omission of personal information from lists that are sold, rented, or exchanged where such exchanges are allowed.

Fair, Equitable, and Transparent Compensation Practices

We believe fundraisers should receive fair and equitable compensation for the work they do in support of organizational missions. In accordance, members are expected to:

23. Support fair and equitable compensation, which may include bonuses or merit pay in line with organizational practices but may never be based on a percentage of funds raised.
24. Decline receiving or paying finder's fees, commissions, or compensation based on a percentage of funds raised.
25. Refrain from offering or accepting payments or special considerations for the purpose of influencing the selection of products or services.

Definitions

Client – Person or organization using the services of a professional person, company, or nonprofit organization.

Conflict of Interest – Conflicts of interest occur when individuals' personal interests could compromise their judgment, decisions, or actions. An appearance of a conflict exists when people with knowledge of the relevant facts question individuals' impartiality.

Donor – A person, organization, corporation, or foundation that makes a gift to a nonprofit organization.

Fiduciary – A term to refer to a person having duties involving good faith, trust, special confidence, and candor toward another. (Black's Law Dictionary)

Member – Any individual or organization who qualifies for and joins AFP in any [member category \(/why-join-afp/membership-categories-pricing\)](#).

Organization – An organized body of people with a particular purpose (nonprofit, business, association)

Stewardship – 1) a process whereby an organization seeks to be worthy of continued philanthropic support, including the acknowledgment of gift, donor recognition, the honor of donor intent, prudent investment of gifts, and the effective and efficient use of funds to further the mission of the organization. 2) the position or work of a steward who manages the process outlined above.

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[Code de déontologie \(https://afpglobal.org/sites/default/files/attachments/generic/Ethics Code 2023 FRENCH 3 2025.pdf\)](https://afpglobal.org/sites/default/files/attachments/generic/Ethics Code 2023 FRENCH 3 2025.pdf)

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[AFP Sample Ethics Education Cases \(https://afpglobal.org/sites/default/files/attachments/generic/AFP_Sample_Ethics_Education_Cases_October_2024_63025.pdf\)](https://afpglobal.org/sites/default/files/attachments/generic/AFP_Sample_Ethics_Education_Cases_October_2024_63025.pdf)

Links

[Fundraising Ethics FAQ \(/ethics/frequently-asked-questions-faqs-about-fundraising-ethics\)](#)

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MODEL STANDARDS OF PRACTICE FOR THE CHARITABLE GIFT PLANNER

A code of ethical practice for all professionals who work together to structure gifts that balance the interests of the donor and the purposes of the charitable institution.

PREAMBLE

The purpose of this statement is to encourage responsible gift planning by urging the adoption of the following Standards of Practice by all individuals who work in the charitable gift planning process, gift planning officers, fund raising consultants, attorneys, accountants, financial planners, life insurance agents and other financial services professionals (collectively referred to hereafter as "Gift Planners"), and by the institutions that these persons represent. This statement recognizes that the solicitation, planning and administration of a charitable gift is a complex process involving philanthropic, personal, financial, and tax considerations, and as such often involves professionals from various disciplines whose goals should include working together to structure a gift that achieves a fair and proper balance between the interests of the donor and the purposes of the charitable institution.

I. PRIMACY OF PHILANTHROPIC MOTIVATION

The principal basis for making a charitable gift should be a desire on the part of the donor to support the work of charitable institutions.

II. EXPLANATION OF TAX IMPLICATIONS

Congress has provided tax incentives for charitable giving, and the emphasis in this statement on philanthropic motivation in no way minimizes the necessity and appropriateness of a full and accurate explanation by the Gift Planner of those incentives and their implications.

III. FULL DISCLOSURE

It is essential to the gift planning process that the role and relationships of all parties involved, including how and by whom each is compensated, be fully disclosed to the donor. A Gift Planner shall not act or purport to act as a representative of any charity without the express knowledge and approval of the charity, and shall not, while employed by the charity, act or purport to act as a representative of the donor, without the express consent of both the charity and the donor.

IV. COMPENSATION

Compensation paid to Gift Planners shall be reasonable and proportionate to the services provided. Payment of finders fees, commissions or other fees by a donee organization to an independent Gift Planner as a condition for the delivery of a gift are never appropriate. Such payments lead to abusive practices and may violate certain state and federal regulations. Likewise, commission-based compensation for Gift Planners who are employed by a charitable institution is never appropriate.

V. COMPETENCE AND PROFESSIONALISM

The Gift Planner should strive to achieve and maintain a high degree of competence in his or her chosen area, and shall advise donors only in areas in which he or she is professionally qualified. It is a hallmark of professionalism for Gift Planners that they realize when they have reached the limits of their knowledge and expertise, and as a result, should include other professionals in the process. Such relationships should be characterized by courtesy, tact and mutual respect.

VI. CONSULTATION WITH INDEPENDENT ADVISORS

A Gift Planner acting on behalf of a charity shall in all cases strongly encourage the donor to discuss the proposed gift with competent independent legal and tax advisors of the donor's choice.

VII. CONSULTATION WITH CHARITIES

Although Gift Planners frequently and properly counsel donors concerning specific charitable gifts without the prior knowledge or approval of the donee organization, the Gift Planners, in order to insure that the gift will accomplish the donor's objectives, should encourage the donor, early in the gift planning process, to discuss the proposed gift with the charity to whom the gift is to be made. In cases where the donor desires anonymity, the Gift Planners shall endeavor, on behalf of the undisclosed donor, to obtain the charity's input in the gift planning process.

VIII. DESCRIPTION AND REPRESENTATION OF GIFT

The Gift Planner shall make every effort to assure that the donor receives a full description and an accurate representation of all aspects of any proposed charitable gift plan. The consequences for the charity, the donor and, where applicable, the donor's family, should be apparent, and the assumptions underlying any financial illustrations should be realistic.

IX. FULL COMPLIANCE

A Gift Planner shall fully comply with and shall encourage other parties in the gift planning process to fully comply with both the letter and spirit of all applicable federal and state laws and regulations.

X. PUBLIC TRUST

Gift Planners shall, in all dealings with donors, institutions and other professionals, act with fairness, honesty, integrity and openness. Except for compensation received for services, the terms of which have been disclosed to the donor, they shall have no vested interest that could result in personal gain.

Adopted and subscribed to by the National Committee on Planned Giving and the American Council on Gift Annuities, May 7, 1991. Revised April 1999.