



SENATE BILL 675: Charitable Orgs. Privacy Protection Act.

2025-2026 General Assembly

Committee:	House Judiciary 2. If favorable, re-refer to Rules, Calendar, and Operations of the House	Date:	June 16, 2026
Introduced by:	Sens. Craven, Overcash, Blue	Prepared by:	Hannah Kendrick
Analysis of:	PCS to Second Edition S675-CSCV-43		Staff Attorney

OVERVIEW: *The Proposed Committee Substitute (PCS) to Senate Bill 675 would enact provisions related to the transfer of property when charitable organizations are named as beneficiaries of nonprobate assets.*

BILL ANALYSIS:

The PCS would create a new Article in Chapter 41 (Estates) of the General Statutes relating to transfers on death to charitable organizations. The Article would do the following:

- Provide affidavit requirements for charitable organizations listed as beneficiaries in certain instruments for the purpose of obtaining the property created by the beneficiary designation or information regarding the property. The affidavit would include all of the following:
 - The decedent's name and last known address.
 - A general description of the property.
 - The charitable organization's name, address, and contact information.
 - A request that the property be transferred to the charitable organization or that specific information about the property be provided.
 - Affirmation that the property owner is deceased and that no one other than the charitable organization has a right to the property.
 - Affirmation that the information provided is true and correct.
- Require that an affidavit be accompanied by all of the listed criteria, including a copy of the charitable organization's letter from the IRS recognizing its tax-exempt status and proof of the decedent's death. The holder of the property or the person with information about the property would be prohibited from requesting additional personal information from any individual employed or serving on the board of directors of the charitable organization.
- Permit the holder of the property to assume the validity of the facts contained in the affidavit and accompanying documents. The holder of the property who delivers the property or information in good faith upon reliance of the facts contained in the affidavit and accompanying documents would not be liable to any person for having delivered the property or information requested.
- Provide that a lien created by a transaction between the charitable organization and a holder of the property or person with information about the property acting in reliance on the affidavit is enforceable against the property.

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Senate 675 PCS

Page 2

- Provide a cause of action if the holder of the property or person with information refuses to provide the requested property or information within 30 days after delivery of the affidavit and accompanying documents. The charitable organization could, within one year of completion of the 30-day period, bring an action to compel delivery of the property or information about the property.

EFFECTIVE DATE: This act would be effective when it becomes law and would apply to affidavits from charitable organizations delivered on or after that date.