



SENATE BILL 675: Charitable Orgs. Privacy Protection Act.

2025-2026 General Assembly

Committee:		Date:	June 30, 2026
Introduced by:	Sens. Craven, Overcash, Blue	Prepared by:	Hannah Kendrick Staff Attorney
Analysis of:	Fourth Edition		

OVERVIEW: *Senate Bill 675 would enact provisions related to the transfer of property when charitable organizations are named as beneficiaries of nonprobate assets.*

BILL ANALYSIS:

Senate Bill 675 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 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 acting in reliance on the affidavit is enforceable against the property.
- Provide that compliance with these provisions would not be required if it would cause the holder of the property to violate state or federal law. If compliance would cause a violation of state or federal law, the following apply:

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- The holder of property would be prohibited from seeking any personal information from any individual employed by or serving on the board of directors of the charitable organization that is not expressly required by law.
- The holder of property would provide written notice of the specific legal authority for the noncompliance to the charitable organization within 30 days.
- A holder of property that originates or transfers securities in reliance on documentation that complies with these provisions would be discharged from all claims to the security by the estate, creditors, heirs, or devisees of a deceased owner.
- Provide a cause of action if the holder of the property refuses to provide the requested property or information within 60 days after delivery of the affidavit and accompanying documents. The charitable organization could, within one year from the sixty-first day following the date of proof of delivery, bring an action to compel delivery of the property or information about the property.
- Require the charitable organization to return to the donor's estate a portion or all of the designated benefits in order to satisfy the allowed claims, statutory allowances, or unsatisfied balance of an elective share claim within 60 days after receiving written notice from the donor's estate.

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.