

***Making Sure Your Act's Together***  
**(F)UPMIFA Checklist**

- 1. Read the (F)lorida Uniform Prudent Management of Institutional Funds Act law.**
- 2. Check with legal counsel to be sure our policies and governance meet the requirements of (F)UPMIFA.**
- 3. Review and Update Investment Policy to be certain it refers to (F)UPMIFA.**
- 4. If we have an endowment, review and update our Spending Policy. Make certain that the board is monitoring the Spending Policy and it references (F)UPMIFA.**
- 5. Review the Gift Acceptance Policy and make certain it references (F)UPMIFA.**
- 6. Hold a board and staff education on (F)UPMIFA, so everyone understands your organization's interpretation of the new law.**
- 7. Adopt a board resolution for (F)UPMIFA and include your organization's interpretation of how it applies to your management of Funds.**

