Charitable Planning

Sophisticated advice to donors, private foundations and public charities

Capabilities at a glance

- **Comprehensive experience in charitable planning** for individual donors and charitable organizations, including private foundations and public charities.
- **We advise on all facets of philanthropy** for high-net-worth families and individuals, including tax-advantaged gifting techniques.
- **We help our clients design a charitable plan that suits their needs**, supporting them with all the necessary internal and external policies related to planned giving.

Effective charitable planning advice

We collaborate with individuals and families to accomplish their philanthropic intentions. We understand charitable giving is often a significant component of our clients' wealth planning. We ensure our clients' philanthropy is tax-efficient, cost-effective, strategic and meaningful. We understand that charitable planning involves ascertaining your charitable goals and providing the tools needed to achieve your legacy.

Helping clients make a substantial and positive impact

Our firm is very active in the field of philanthropy, providing counsel to foundations with a range of asset values. We work with clients on the creation and administration of multiple planned giving techniques:

- Private grant-making foundations
- Donor-advised funds
- Charitable remainder trusts
- Charitable lead trusts
- Charitable bequests
- IRA distributions and beneficiary designations
- Gifts of complex assets, including real estate, artwork and insurance
- Gift agreements
- Pledge letters

Practice Contacts

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We also advise public charities in connection with receipt of charitable bequests from estates and trusts. We combine our probate and trust law knowledge with our charitable tax compliance experience to counsel public charities when they are designated to receive estate and trust distributions, including representing multiple charities who have substantially the same interests in an estate or trust. This includes defending charitable bequests against challenges from heirs. We also review trusts for potential modification and ensure that charities receive accountability in estate and trust administrations.

Service Areas

Fiduciary Litigation
We represent fiduciaries and beneficiaries involved in trust contests, will disputes, attempted removal or surcharges of trustees, will and trust constructions, and other fiduciary litigation. Drawing on the combined resources of a long-established Estate, Trust & Wealth Preservation Practice Group and a strong bench of litigators, we achieve solid results efficiently and effectively.

Tax

Tax-Exempt Organizations
As part of a full-service firm with offices across the country, we blend the responsive, focused attention of a boutique practice with the resources of a national firm, offering common sense solutions to complex legal concerns. This practical attitude is coupled with our attorneys' exceptional legal knowledge and extensive real-world experience.