

# Charitable Planning and Family Foundations

Supporting charitable causes is important for many of our clients. We help clients donate to the causes they are passionate about in a tax-efficient manner through thoughtful charitable planning and family foundations. Effective charitable planning also can generate large income, estate or gift tax deductions.



## Planning For Your Legacy

Our clients' goals range from leaving a small amount to a single charity, to establishing a family foundation for tax-advantaged charitable giving. In every case, we help our clients understand the various methods to achieve their charitable goals, seeking to maximize our clients' tax benefits. Specifically, we frequently establish or refine:

- Charitable Lead Trusts
- Charitable Remainder Trusts
- Bargain Sales to Charities
- Private Foundations
- Private Operating Foundations
- Public Charities

## Assisting Charitable Organizations

We also represent charitable organizations, helping them with entity formation, educating them and their potential patrons on philanthropy, and providing ongoing advice. Our support includes recordkeeping, operational strategies, and tax and regulatory compliance. We also help create goodwill with businesses and other charities for fundraising purposes. When necessary, we represent charities in litigation against those disputing a will or trust, fiercely defending a charity's right to its bequest.

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**In all cases, whether supplementing a tax plan with charitable giving or providing for an enduring legacy, we work collaboratively and creatively to find the best solution.**

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- Wealth Transfer Planning
- Business Succession Planning
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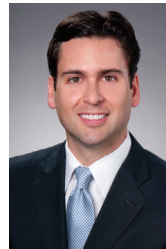
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