

Gifts To Charity - Planned Gifts

Many of our clients currently contribute to charities and/or wish to include charities in their estate plans. Gifting to a charity can be very fulfilling in a personal way but also may provide income and/or estate tax benefits. We work with a number of techniques which allow our clients the opportunity to provide for both their families and charities in a very tax advantaged way.

We incorporate Pension and IRA Rescue Programs, IRA loans, Charitable Gift Annuities, Flexible Endowments, and many other Planned Giving Techniques which often times allow the client/donor to give gifts which they did not realize they were capable of giving.

We are also the advisors to numerous charities in the area of Planned Giving. Some of the charities are local and others are local chapters of national organizations. If you are involved with a charity and would like our help please let us know.