Charitable Planning

Charitable planning is centered on leaving a legacy that reflects personal values and supports personally meaningful causes by integrating philanthropic goals into an estate plan in a tax-efficient and impactful way. We guide our clients through a variety of charitable giving strategies, including the use of charitable bequests as part of a will, various charitable trust options that can provide income tax benefits and estate tax reductions, the establishment and administration of private foundations, and the strategic designation of charities as beneficiaries of life insurance policies or retirement accounts.

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