

How to Give It Away Effectively ©

Objective: We are in the middle of the greatest transfer of wealth in history. Money or property is often transferred to children and grandchildren. However, many people also want to further their philanthropic interests. This course addresses the relevant issues.

What you will learn:

- The tax and non-tax factors to consider in transferring wealth
- Factors to consider in transferring wealth to children and grandchildren
- Considerations in selecting charities to benefit
- The advantages and disadvantages of charitable lead trusts and charitable remainder trusts
- How private foundations work
- The benefits and drawbacks of outright bequests and gifts in trust
- The consequences of gifts from IRAs and retirement plans

CPE: 4 hours

Level: Basic

Category: Tax/Consulting

Prerequisites: None