

Charitable Gift Giving

Objective: Many people want to help others and save taxes at the same time. This course will address a variety of ways property can be transferred to a charity. The income and estate tax savings will be addressed. The instructor is an attorney, CPA, and Chartered Financial Analyst. He will offer many practical tips, and note when use of each technique may be advisable.

What you will learn:

- Outright gifts of cash and property
- Income tax deduction limitations
- Charitable lead trusts
- Charitable remainder trusts
- Bargain sales of property to a charity
- Private foundations
- Documentation and appraisal requirements
- Tips for evaluating a potential charitable recipient
- Other benefits that can be obtained by giving

CPE: 4 or 8 hours

Level: Overview

Category: Tax

Prerequisites: None

Instructor: Dennis J. Gerschick