

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 rules 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.

Learning objectives:

- Set forth the income tax deduction limitations
- Describe the rules for charitable lead trusts and charitable remainder trusts
- Explore other sophisticated techniques for charitable gift-giving
- Explain the pros and cons of a private foundation
- Point out the documentation and appraisal requirements
- Provide tips for evaluating a potential charitable recipient
- Assess other benefits that can be obtained by giving
- Note the lessons that can be learned from court cases and IRS rulings

CPE: 4 hours

Level: Overview

Category: Tax

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: CGGV