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Donor advised funds, endowment funds, gift planning, planned giving, donating gifts of securities

Combination Gift Plans

Nicola · Monday, October 24th, 2016

Combination Gift Plans

Combining estate plans and lifetime financial plans can be challenging, especially for individuals who have dedicated a significant portion of their estate to charity, for example 50% or more. Wills are often drafted independently of lifetime financial plans. The drafting lawyer may not ask the question “is it prudent and advantageous to start giving major gift during life?”. In certain situations, there are significant tax and philanthropic benefits to start estate donations during life.

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