



## Planned Charitable Giving

# *Planned Charitable Giving*

STRADLEY  
RONON

## Our Experience

We draw on the experience of various practice groups and many multi-disciplinary attorneys to tailor our advice to each client's needs. Our attorney teams operate together to address our clients' issues wherever they may occur in the United States or around the world.

Our trusts, estates and personal planning group regularly provides advice to both donors and charitable organizations on the tax-saving devices often used in planned-giving programs, including charitable remainder trusts, charitable lead trusts, gift annuities, personal-residence trusts, and other vehicles allowing the grantor to retain control of assets and minimize taxation.

We also handle all aspects of the development and management of charitable-giving programs, from drafting policies and procedures to helping select administrators and investment advisers for planned-giving vehicles. Our lawyers also handle the routine aspects of organizing planned-giving programs, including:

- drafting policies and procedures
- drafting gift acceptance procedures
- advising boards of directors on



establishing planned-giving programs

- drafting charitable lead trusts and charitable remainder trusts
- advising on the establishment of gift annuity programs
- reviewing marketing materials
- providing sample donor documents
- assisting charities and donors with establishing planned gifts
- acting as general counsel to

charities with planned-giving programs

- helping to select administrators and investment advisers

### Contacts:

#### John C. Hook

215.564.8057

jhook@stradley.com

#### Russell J. Ressler

484.323.1346

rressler@stradley.com

## About Stradley Ronon

For more than 95 years, Stradley Ronon has helped private and public companies – from small businesses to Fortune 500 corporations – achieve their goals. With nine offices and more than 200 attorneys, Stradley Ronon is proud to help companies manage their legal challenges and grow their businesses.

[www.stradley.com](http://www.stradley.com) | Pennsylvania | Washington, D.C. | New York | California | New Jersey | Illinois | Delaware

This communication is provided as a general informational service to clients and friends of Stradley Ronon Stevens & Young, LLP. It should not be construed as, and does not constitute, legal advice on any specific matter, nor does this message create an attorney-client relationship. The enclosed materials may have been abridged from other sources. They are provided for educational and informational purposes for the use of clients and others who may be interested in the subject matter. This material may be considered attorney advertising in some states. Please note that the prior results discussed in the material do not guarantee similar outcomes.

