



Planned Charitable Giving

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

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About Stradley Ronon

For more than 90 years, Stradley Ronon has helped private and public companies – from small businesses to Fortune 500 corporations – achieve their goals. With seven offices and more than 200 attorneys, Stradley Ronon is proud to help companies manage their legal challenges and grow their businesses.

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