

CAPABILITIES / TRUSTS & ESTATES

Charitable Giving

As the amount of charitable giving continues to rise, Obermayer advises clients committed to philanthropy on the best way for clients to turn that commitment into reality while minimizing their tax burden and ensuring their own financial security.



OVERVIEW

"We understand how complex the estate and financial planning process can be and will work closely with you on a charitable giving strategy that will bring the maximum benefit to your estate."

— Paul Heintz

Our Value

Charitable giving can serve as an effective tool in the overall estate planning strategy. While an individual's motivation for making a charitable donation is not necessarily the charitable deduction, taking advantage of the deduction is a nice benefit. We work with clients to evaluate commonly used charitable structures to identify those that best suit their individual needs and regularly advise them on related income tax and estate tax charitable deduction issues, tax exemption and compliance issues. Gifts may be outright, or may be planned through testamentary disposition or split-interest trusts. We frequently provide detailed counseling to clients on the structure and implementation of charitable lead trusts and remainder trusts and also assist clients with the formation and administration of family foundations.

Lifetime Gift and Tax Planning: Many of our clients wish to incorporate lifetime gift and tax plans for their family, relatives or charity interests. We use a variety of techniques to develop a gift plan that will achieve the most advantageous results to meet our clients' tax and personal gifting needs by minimizing the individual's taxable estate, protecting beneficiaries from threats of divorce or financial insecurity, and achieving philanthropic goals. Our attorneys also frequently assist with the preparation and filing of any required Federal Gift (and Generation-skipping Transfer) Tax returns.

Our Clients

Our attorneys work closely with our clients, whether as private individuals or in a corporate capacity, to assess the available options based on the client's projected income needs and the desired timing of the charitable gift. We also represent charitable organizations that are the designated recipients of gifts in the evaluation of the estate or trust from which they are to receive benefits, and pursue their questions to the extent there are irregularities in the administration. Occasionally, a charitable organization is designated as an executor or trustee, and we offer strategic, sophisticated advice to assist them in their fiduciary capacity as well.

Our Focus

Each client's situation is unique, and there is no one-size-fits-all approach to charitable giving strategies. Ideally, charitable giving and wealth transfer objectives are developed together, and our Trust and Estate attorneys ensure that each client's giving plan aligns with the client's overall estate plan. Our focus is on helping guide clients through the process of safeguarding their lifetime financial security, maximizing wealth transfer to the people and organizations that matter most, while also maximizing the amount of money that is sheltered from taxes. We have extensive experience in matching philanthropic goals and priorities with tax and financial planning strategies and are well-versed in the intricacies of the constantly changing tax laws relating to charitable giving.

Awards Won*





*[Click here](#) for a description of the standard or methodology on which the awards and honors are based. No aspect of this advertisement is approved by the Supreme Court of New Jersey.

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