CUMMINGS & LOCKWOOD LLC

ESTATE PLANNING FOR INDIVIDUALS INTERESTED IN GIVING TO CHARITY

November 2018

Stefania L. Bartlett and Cara Howe Santoro, trusts and estates attorneys in Cummings & Lockwood's Private Clients Group in Stamford, Connecticut, discuss how, even with higher exemptions, many individuals are still motivated to give to charity to reduce taxes and to fulfill philanthropic goals. This presentation helps individuals choose between outright charitable gifts, restricted charitable gifts, split interest trusts such as CRUTs and CLATs, donor advised funds and creating their own private foundations. (19:49)

This presentation was part of a firm-hosted seminar for professional advisors in November 2018, entitled "Estate Planning for the Different Stages of Your Client's Lifecycle."