THE POWER OF BEING UNDERSTOOD

CHARITABLE PLANNING SERVICES

Determining your charitable vision

How do you plan to see your charitable goals fulfilled?

Are you maximizing the income tax benefits with each charitable contribution you make?

Though not everyone can create the largest foundation in the world, each of us can make a difference in the lives of others and leave behind a legacy of giving. Many people spend their lives obtaining and accumulating wealth and reach a point when they decide it is time to give back. A sound and well-thought-out giving strategy can result in meaningful and effective donations.

Our private client services professionals have a plethora of experience developing charitable giving strategies that address the needs of the philanthropically disposed.

A holistic look at the possibilities

With so many quality charitable programs and avenues of giving available, planning for philanthropic giving can lead to many difficult decisions. Questions to consider:

- What should you give away?
- How do you choose the recipients of your donations?
- Do you create and manage your own entity?
- Do you want to establish a long-term strategy involving your children?
- Should you give during your lifetime or leave a charitable bequest?
- When should you donate?
- How can your business be incorporated into the gifting plan?

Together, our RSM professionals work with you to address these and dozens of other issues from personal, financial and tax perspectives to design a strategy that matches your vision and fits your circumstances.

Building your legacy

Just as no two people have exactly the same charitable vision, no two charitable plans are the same. There are many ways to see your goals fulfilled.

Our team will work closely with you and your family to:

- Identify charitable interests and values
- Develop a strategic giving plan
- Maximize income tax benefits
- Integrate your charitable planning into your gift and estate tax planning strategy
- Determine the optimal charitable entity structure
- Charitable lead trust
- Charitable remainder trust
- Public or private foundation
- Donor-advised fund
- Remainder interest in a personal residence or farm
- Assist with entity governance and management selection, including engaging the next generation
- Ascertain the best assets for charitable funding to maximize benefits
- Determine asset valuation issues and qualified appraisal requirements
- Assist with documentation and reporting requirements
- Devise and implement an investment policy for a charitable entity's funds

From our vast experience, we understand the issues associated with charitable giving and legacy planning. Our private client services professionals are there every step of the way in helping to develop a successful and effective plan specific to you and your charitable vision.

That's the power of RSM. *The power of being understood.*®

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