

Services & Industries

Charitable Planning

We assist our clients in creating charitable components to their estate or business succession plans that help them meet their charitable goals while taking advantage of available tax benefits.

Charitable planning is a major element of our estate planning services, and we have significant experience in establishing all types of charitable planning vehicles. We have advised clients on life estates, charitable remainder interests, Charitable Remainder Trusts (CRTs), Charitable Lead Trusts (CLTs), gift annuities, family foundations and donor-advised funds through community foundations or other charities.

Our attorneys have served as directors or trustees of foundations, community foundations and other public charities, providing us with significant experience in understanding charitable planning from both the organization's point of view and the client's perspective.

Related Practice Areas

- Estate & Probate Litigation
 - Estate & Trust Administration
 - Estate Planning
 - Guardianship
 - Private Wealth Services
 - Wealth Planning
 - Wills & Trusts
-

Key Contact



Julia L. Frey

Shareholder & Chair,
Private Wealth Services Group
407-418-6243
julia.frey@lowndes-law.com
