

Charitable Planning

New Jersey Estate Attorneys Handling Charitable Planning

While certainly all of our New Jersey clients wish to provide for the well-being of their families and future generations, many of our clients are also interested in achieving philanthropic goals as well. Sometimes these clients wish to be generous while they are living, and sometimes they wish to provide for charities when they are gone.

There are many ways to achieve all of these goals, as they are not mutually exclusive.

Charitable Foundations and Gifts

When advising our charitably inclined clients, we make sure that we structure their estate and gift plans in a way to maximize the tax benefits that go along with charitable giving. Often, we advise our clients on the establishment of:

- Private/family foundations;
- Charitable remainder annuity trusts;
- Charitable remainder unitrusts;
- Charitable lead annuity trusts;
- Charitable lead unitrusts;
- Charitable gift annuities;
- Donor advised funds;
- Net-income make-up charitable remainder unitrusts;
- “Flip” unitrusts; and
- Endowments.

When we advise our clients in charitable planning, we ensure compliance with state and federal regulations. Our estate planning attorneys also provide legal advice on trust and corporate governance for charitable foundations.

Gift Planning

Our representation of New Jersey clients often includes establishing annual gifting programs as one of the most effective ways to minimize estate taxes and protect family assets. Often we will suggest, explain and implement creative trust vehicles to leverage your gift tax exclusions and credits.

Exempt Organizations

We help tax-exempt organizations secure and maintain their charitable status, which often involves guidance on establishing the most effective grant-making policies. Our lawyers often counsel exempt organizations on their investment, reporting and tax obligations under New Jersey and federal laws. We advise clients and participate in IRS audits and inquiries and secure letters of determination.

Charitable Trusts and Foundations

Our lawyers have counseled New Jersey clients in the formation and structure of charitable trusts and foundations with millions of dollars in assets. We are prepared to advise charitable organizations about endowment development programs, including the structuring and operation of donor-advised funds and supporting foundations.

Charity Starts at HomeAt Einhorn Barbarito we believe that our clients' philanthropic pursuits are important. We feel this way because we feel the same. Our firm encourages our attorneys to participate in various philanthropic endeavors. Partners in our firm sit on the boards of the Morris County Bar Association Foundation, the Jewish Community Foundation of Metrowest, Oasis House, Paterson Catholic Regional High School Board, Parsippany Police Athletic League, and many more.

Contact a New Jersey Estate Planning Attorney Today to Assist with Your Charitable Planning

Given the complexities of Charitable Planning in New Jersey, we advise you to contact one of our experienced estate planning or tax attorneys at [973-627-7300](tel:973-627-7300) at Einhorn Barbarito today. We handle estate, tax and trusts issues throughout New Jersey.