

Charitable Gift Planning


Adler & Colvin provides a broad spectrum of charitable gift planning services to both nonprofit organizations and the individuals and companies who support them. Our attorneys possess a deep understanding of the charitable gift planning process and the issues that arise during the life of a charitable gift.

AREAS OF FOCUS

- › Establishing and administering planned giving programs, including preparation of gift acceptance policies.
- › Representing charities in specific gift transactions, including charitable remainder trusts, charitable gift annuities, charitable lead trusts, and pooled income funds.
- › Advising on legal issues in gift administration, including endowments, investment policies, donor privacy, and gift restrictions.
- › Drafting and negotiating pledge agreements between donors and charities.
- › Designing optimal gift structures and working with donors to achieve their philanthropic, financial, tax, and family goals.
- › Assisting with issues faced by trust companies, banks, accountants, and other lawyers in structuring and administering charitable gifts.

CONTACT INFORMATION

 contact@adlercolvin.com

 (415) 421-7555

 (415) 421-0712

REPRESENTATIVE CLIENTS

- › Silicon Valley Community Foundation
- › Guide Dogs for the Blind
- › University of California Berkeley Foundation
- › KQED (Northern California Public Broadcasting)
- › The San Francisco Foundation

PRACTICING ATTORNEYS

- › Erik Dryburgh
- › Matt Clausen