

Ronni Davidowitz, Head of the New York Private Wealth Practice, Quoted in *Investment News* on Taxation of Stock Donations

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Ronni Davidowitz, head of the New York Private Wealth practice, spoke with *Investment News* regarding how to avoid capital gains taxes when donating shares of a company undergoing a corporate inversion. United States-based companies have begun trying to duck corporate taxes as high as 35 percent stateside by expatriating to foreign countries; such inversions tend to result in higher tax bills for shareholders, however, as once a deal goes through, an investor with shares of the US-based company is involuntarily swapping them for shares of the new foreign company, triggering a capital gains tax. While financial advisors suggest potentially donating the shares to charitable organizations to mitigate the tax, when to make the gift remains a crucial consideration. As Ronni explained, "The problem is that if you have a deal in the offing, you're down certain paths and the capital gains realization will still be visited on the donor." ("[Timing Charitable Gifts to Avoid an Inversion's Tax Bite](#)," August 12, 2014)

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