

Charitable Planning, Philanthropy and Nonprofit Organizations

Overview

As interest in philanthropy and charitable giving has increased over the years, more advisors are needed who can provide the right strategy and guidance. Our Private Wealth team has always counseled high net worth individuals on how to integrate philanthropy into planning and offers overall invaluable knowledge to charitable and nonprofit organizations, philanthropists, corporations and private donors in all aspects of charitable planning.

Understanding all charitable objectives

Our attorneys know how to help high-net-worth individuals and families achieve their charitable objectives, whether in creating different kinds of charities and private foundations or forming charitable split interest trusts and other structures.

Our attorneys' experience in this area also extends to representing diverse nonprofit organizations, such as public charities and private foundations, in all aspects of their life cycle, from formation, administration, governance and compliance to mergers, liquidations and dissolutions. As part of a larger firm, we are able to partner with other practice groups to offer comprehensive guidance on the myriad issues that can arise in connection with the creation and administration of nonprofit organizations, including corporate structuring, intellectual property, employment, real estate and tax.

Our services include:

- Charitable gift planning, including offering advice on creating charitable lead and charitable remainder trusts
- Preparing donor gift agreements
- Protecting the legacies and endowments of charities, and maximizing their planned giving efforts
- Structuring private foundations for individuals and families
- Forming nonprofit organizations, including public charities, private foundations, social organizations, religious groups, educational institutions and health care organizations
- Obtaining tax-exempt status recognition
- Obtaining cy-pres relief where restrictions on gifts can no longer be fulfilled
- Counseling nonprofit organizations and charitable entities on all aspects of administration, governance and ethics, tax treatment and compliance, and mergers and dissolutions

- Assisting with attorney general inquiries and IRS proceedings
- Counseling and representing boards and officers

Key Contacts

Ronni G. Davidowitz

Partner



New York

+1.212.940.7197

ronni.davidowitz@katten.com

Michael O. Hartz

Partner



Chicago

+1.312.902.5279

michael.hartz@katten.com

Carol A. Johnston

Partner



Los Angeles – Century City

+1.310.788.4505

carol.johnston@katten.com