Planned Giving

We are masters at planned giving for high net worth individuals and their families. Our Private Wealth group orchestrates estate and tax planning strategies to maximize philanthropic gifts and minimize taxes. Today's planned giving makes philanthropy a core consideration for donors who want to customize their charitable gifts, measure results and be confident that their charitable intent will be safeguarded.

In tandem with planned giving structures, we offer sophisticated counsel to clients who embrace the concept of "giving while living." We work with high net worth families who seek to include philanthropy as part of their legacy.

We parlay our in-depth knowledge and decades of experience with private foundations, donor advised funds and charitable trusts to help clients navigate the philanthropic landscape and invest in charitable entities and structure philanthropic vehicles that meet their personal goals and objectives.

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