

Charitable Planning

We assist our clients in creating charitable components to their estate or business succession plans that help them meet their goals while taking advantage of available tax benefits.

Charitable planning is a major element of our estate planning services, and we have significant experience in establishing all types of charitable planning vehicles.

We advise clients on:

- Life estates
- Charitable remainder interests
- Charitable Remainder Trusts (CRTs)
- Charitable Lead Trusts (CLTs)
- Gift annuities
- Family foundations
- Donor-advised funds through community foundations or other charities

Our attorneys have served as directors or trustees of foundations, community foundations and other public charities. This provides us with significant experience in understanding charitable planning from both the organization's point of view and the client's perspective.

News

Lowndes Named to *Orlando Business Journal's* 2020 Central Florida Philanthropic Companies/Organizations List
12.14.2020 | AWARDS & RECOGNITION

Publications

Orlando Museum of Art Seeks to Undo Restrictions on Charitable Bequest
05.23.2024 | ARTICLE

Key Contact

Julia L. Frey

Related Professionals

Julia L. Frey

Matthew R. O'Kane

Norma Stanley

Related Expertise

Estate & Trust Administration

Estate Planning

Family & Marital Law

Family Business & Succession Planning

Guardianship

Nonprofit Organizations

Probate & Estate Litigation

Tax

Wills & Trusts