



---

## nonprofit organizations

---

We represent a wide range of tax-exempt organizations including public charities, private foundations, museums, hospital foundations, religious institutions, charitable trusts, trade associations, universities and schools.

MSK has a long tradition of providing a diverse range of services to charitable organizations and their donors, including:

### ***general counseling***

In conjunction with our Labor and Employment, Corporate, and Executive Compensation and Employee Benefits Practice Groups, we regularly advise nonprofit boards and management concerning a wide variety of legal issues including nonprofit corporation law, governance, conflicts of interest and other policies and procedures, executive compensation, benefit plans, employee relations, real estate, intellectual property, taxable unrelated business activities and fiduciary responsibilities.

### ***regulation of activities***

Our Nonprofit Organizations Practice Group provides insightful guidance concerning regulation by federal, state and local authorities of fundraising, raffles and gaming, grant-making and scholarships, lobbying, political activities and other programs of nonprofit organizations. This area of our practice often involves obtaining advance approval of proposed transactions and programs.

### ***transactions and special structures***

We represent tax-exempt organizations in structuring, negotiating, and documenting significant transactions, including mergers, acquisitions, restructurings, asset purchases, dispositions and dissolutions. We have substantial experience in establishing joint ventures, for-profit and nonprofit subsidiaries, supporting organizations, donor advised funds and other special structures. Our practice entails all aspects of these transactions and any related financing — we provide innovative and cost-effective deal structuring, negotiations, regulatory compliance and preparation of all deal documents.

### **practice contact**

David Wheeler Newman

### **attorneys**

Karl de Costa

Allan B. Cutrow

Jeffrey D. Davine

Jeffrey K. Eisen

Seth W. Krasilovsky

Robert J. Lowe

### **related practices areas**

corporate & business transactions

labor & employment

tax and trusts & estates



***tax controversies***

We represent charitable organizations and their donors in tax controversies with state and federal tax authorities. This practice includes administrative appeals as well as tax litigation in the U.S. Tax Court and other forums.

***formation of nonprofit entities***

MSK assists clients with the formation of tax-exempt and nonprofit entities of various types. This assistance often includes advice of the appropriate choice of entity for the charitable or other nonprofit purpose to be served. We then prepare all necessary documentation to establish the nonprofit corporation, charitable trust, restricted fund or other appropriate entity.

***international operations***

Our attorneys have significant experience with foreign operations of charitable organizations, including the development of domestic "Friends of" organizations, overseas grant-making and expenditures, federal anti-terrorism regulations and establishing international affiliations.

***tax-exempt financing***

Our tax-exempt financing practitioners have particular expertise as borrower's counsel for tax-exempt schools and other nonprofit institutions.

***charitable gift planning***

We have considerable expertise in the legal and tax aspects of charitable gift planning and a national reputation for innovation and creativity in structuring current and deferred charitable gifts. A primary strategy of our work in planned giving is to integrate the donor's financial planning with his or her philanthropic objectives. We regularly draft charitable remainder trusts and other documentation of charitable gifts, making a special effort to develop systems that deliver services and documents routinely required by charities in their development programs.

***bequest realization / probate matters***

The Nonprofit Organizations Practice Group works closely with our Trusts & Estates Practice, bringing together attorneys with expertise in tax, trusts and estates, and litigation. They address the philanthropic element of estate planning and also represent charitable organizations as beneficiaries of estates and trusts when a dispute arises. Our significant experience in this area makes us particularly well-attuned to the special considerations facing charities seeking long-term gifts and bequests to which they are entitled.

We assist charities with the collection of bequests. Our services include helping clients monitor routine bequests to expedite realization, defending charitable bequests against will contests, and negotiating the apportionment of estate taxes to maximize the charitable gift. Our probate practice covers all aspects of creative pre- and post-death planning and administration, with a special emphasis in the representation of fiduciaries and beneficiaries in disputed estate and trust administration matters. This practice combines the skills of our firm's litigation group



with our creative probate practitioners to take the lead in resolving such matters.

### ***gift annuity licenses***

Many charitable organizations have retained us to process state and federal gift annuity license and exemption applications. We represent these organizations before the California Department of Insurance, and its counterparts in other states, in preparing and processing the license applications and providing ongoing advice concerning the operation of their gift annuity programs. Because we handle a large number of these matters every year, we are able to process them cost effectively and obtain the licenses as quickly as possible.

### ***charitable giving form documents***

We license to charitable organizations a book of over thirty planned giving form documents for planned giving officers to prepare as drafts for review by the donor's counsel. The forms include charitable remainder trusts (CRTs), gift annuities, lead trusts and pledge letters. Our clients have found this package to be a cost effective way to prepare high quality draft documents.

## **representative clients**

At any given time we are doing work for dozens of public charities. Representative clients of this practice group include:

- California Institute of Technology
- California Polytechnic State University Foundation
- Casa Colina Centers for Rehabilitation
- Chapman University
- Children's Hospital of Los Angeles
- Claremont McKenna College
- Jewish Community Foundation of Los Angeles
- Little Company of Mary Community Health Foundation
- The Nature Conservancy
- Providence Health and Services Foundation
- Ronald McDonald House
- Scripps College



- UCLA Foundation
- UCSF Foundation
- World Vision

## headlines

12 MSK Attorneys Named to the 2026 Edition of Southern California *Super Lawyers*  
*Super Lawyers* , February 20, 2026

37 MSK Attorneys Named Among *The Best Lawyers in America*® for 2026  
*Best Lawyers*, August 21, 2025

13 MSK Attorneys Named to the 2025 Edition of Southern California *Super Lawyers*  
February 18, 2025

*Best Lawyers* Recognizes Mitchell Silberberg & Knupp in 2025 "Best Law Firms" Rankings  
November 7, 2024

34 MSK Attorneys Named Among *The Best Lawyers in America*© for 2025  
August 15, 2024

12 MSK Attorneys Named to the 2024 Edition of Southern California *Super Lawyers*  
January 10, 2024

*Best Lawyers* Recognizes Mitchell Silberberg & Knupp in 2024 "Best Law Firms" Rankings  
November 2, 2023

38 MSK Attorneys Named Among *The Best Lawyers in America*© for 2024  
August 17, 2023

*Best Lawyers* Recognizes Mitchell Silberberg & Knupp in 2023 "Best Law Firms" Rankings  
November 2, 2022

U.S. News & World Report Recognizes Mitchell Silberberg & Knupp in 2022 "Best Law Firms" Rankings  
November 4, 2021

26 MSK Attorneys Named Among *The Best Lawyers in America*© for 2022  
August 19, 2021

*U.S. News & World Report* Recognizes Mitchell Silberberg & Knupp in 2021 "Best Law Firms" Rankings  
November 2020



## nonprofit organizations

---

33 MSK Attorneys Named Among *The Best Lawyers in America*® for 2021  
August 20, 2020

U.S. News & World Report Recognizes MSK Among 2019 "Best Law Firms" Rankings  
November 1, 2018

*The Best Lawyers in America*® 2019 Recognizes 24 Attorneys from MSK  
August 15, 2018

S. Eva Wolf Named to *Profiles in Diversity Journal's* 2018 "Women Worth Watching" List  
June 7, 2018

MSK Elects S. Eva Wolf and Janice Luo to Partnership  
December 21, 2017

MSK Named Among 2018 Best Law Firms  
November 1, 2017

David Wheeler Newman Presented with Distinguished Service Award from LA Council of Charitable Gift Planners  
June 1, 2017

MSK Named Among 2017 Best Law Firms  
November 1, 2016

The Best Lawyers in America® 2017 Recognizes 22 Attorneys from Mitchell Silberberg & Knupp  
August 22, 2016

David Newman Represents UCLA Foundation in Fielding's \$50 Million Donation  
February 18, 2012

U.S. News Ranks MSK Charitable Sector Practice Among Best in Los Angeles  
January 15, 2011

Success in Pro Bono Nature Conservancy Case  
March 20, 2007

### news

S. Eva Wolf and Janice Luo Featured in *Law360*  
August 9, 2018

Jeffrey Eisen Featured in *Law360*  
October 6, 2017



## nonprofit organizations

---

David Wheeler Newman Mentioned in *Attorney At Law Magazine*  
August 10, 2016

David Wheeler Newman Mentioned in *L.A. Biz*  
*L.A. Biz*, June 28, 2016

Mitchell Silberberg & Knupp Recognized as Leading Law Firm by The Legal 500 2015 USA Guide!  
July 2015

U.S. News & World Report Recognizes Mitchell Silberberg & Knupp in 2015 "Best Law Firms" Rankings  
November 3, 2014

The Best Lawyers in America© 2015 Recognizes 21 Attorneys from Mitchell Silberberg & Knupp and Names 2 Attorneys "Lawyer of the Year"  
August 2014

*U.S. News & World Report* Recognizes MSK in 2013-2014 "Best Law Firms" Rankings  
November 2013

21 MSK Attorneys Selected for *Best Lawyers in America 2014*  
August 15, 2013

Four MSK Attorneys Named to Southern California's *Super Lawyers'* Rising Stars List  
June 2013

MSK Named to *National Law Journal's* 2013 "Midsize Hot List"  
April 10, 2013

*U.S. News & World Report* Recognizes MSK in 2012-2013 "Best Law Firms" Rankings  
November 1, 2012

21 MSK Attorneys Selected for *Best Lawyers in America 2013*  
August 24, 2012

MSK Ranked Among Leading Tax Law Firms in *Tax Directors Handbook 2012*  
January 26, 2012

*U.S. News & World Report* Recognizes MSK In 2011-2012 "Best Law Firms" Rankings  
November 1, 2011

MSK Attorneys Recognized Among "The Best Lawyers in America" for 2012  
August 31, 2011

Nine MSK Attorneys Named to Southern California *Super Lawyers'* Rising Stars List  
June 13, 2011



*Chambers USA* Recognizes MSK Attorneys Among America's Leading Lawyers  
June 10, 2011

*The 2011 Legal 500 USA Guide* Recognizes MSK Attorneys and Intellectual Property and Tax Practice Groups Among the Nation's Best  
June 9, 2011

Jeffrey Davine Selected for Taxpayer Advocacy Panel (TAP) for 2011-2013  
November 23, 2010

MSK Recognized in *U.S. News & World Report/Best Lawyers* "Best Law Firms" Rankings  
September 15, 2010

*The 2011 Best Lawyers in America* Recognized MSK Attorneys from Nine Practice Areas  
August 19, 2010

The Best Lawyers in America 2010  
August 3, 2009

MSK Ranked Among the Leading Tax Law Firms in the West  
December 30, 2008

*The Best Lawyers in America* 2009  
September 17, 2008

*The Legal 500* Ranks MSK Among "Top Firms" and Partners Among "Leading Lawyers"  
June 17, 2008

## publications

Nonprofit Industry Veteran joins Nonprofit Industry Powerhouse  
June 20, 2016

Charitable Gifts of Real Property  
September 29, 2015

Finally, California's on the Federal Charitable Trust Train  
*Daily Journal*, October 29, 2014

Co-Investing by Private Foundations and Disqualified Persons  
November 2011

Walking the Fuzzy Line Between Independent Contractor and Employee  
*AccountingToday.com*, July 2011



How to Prepare for an IRS Employment Tax Compliance Audit  
*The Nonprofit Quarterly*, June 7, 2011

Effective Gift Acceptance Policies and Procedures  
*The Journal of Gift Planning*, August 2009

An Updated Guide to Donor-Advised Funds  
*Taxation of Exempts*, March/April 2009

## alerts

Understanding UPMIFA: Fiduciary Issues with Mission-Related Investing  
*Client Alert*, May 14, 2024

Is this the Golden Age of CLATs?  
*MSK Client Alert*, May 1, 2020

A Movable Feast  
*MSK Client Alert*, March 28, 2019

Delinquent Taxpayers May Need to Rethink Travel Plans  
*MSK Client Alert*, November 19, 2018

Can Charitable Remainder Trusts Avoid the Self-Dealing Rules?  
*MSK Client Alert*, May 15, 2017

Understanding UPMIFA: Delegation of Management and Investment of Endowment Funds  
*MSK Client Alert*, February 23, 2017

Valuation Rule For Early Termination of Net-Income Charitable Remainder Unitrusts  
*MSK Client Alert*, June 27, 2016

Were These The Extenders That We Were Waiting For?  
*MSK Client Alert*, December 2014

Qualifying for 501(c)(3) Tax Exempt Status is Tricky  
November 5, 2014

IRS Issues Final Report on Colleges and Universities Compliance Project  
*MSK Client Alert*, April 29, 2013

Rebirth of the Charitable Remainder Trust  
*MSK Client Alert*, April 2013



The Impact on the Charitable Deduction of the New Phaseout of Itemized Deductions

*MSK Client Alert*, January 2013

Allocating Costs When Calculating UBTI - Let's be "Reasonable"

*MSK Client Alert*, April 19, 2012

IRS Rules That Providing Consulting Services to Nonprofits at Cost is Not an Exempt Purpose

*MSK Client Alert*, March 2012

New IRS Publication Addressing Charitable Contribution Substantiation and Disclosure Requirements

*MSK Client Alert*, March 12, 2012

Changing the Tax Status of a Charitable Organization

*MSK Client Alert*, February 14, 2012

Disclosure of Charitable Remainder Trusts on Form 990

*MSK Client Alert*, January 23, 2012

IRS Says "Let's Make a Deal" (Regarding Misclassified Workers)

*MSK Client Alert*, January 9, 2012

California Loosens Its Geographically-Based Restriction on Property Tax Exemptions for Nonprofits

*MSK Client Alert*, December 12, 2011

ACGA Issues New Rates for Charitable Gift Annuities

*MSK Client Alert*, November 21, 2011

Approval of Model Protection of Charitable Assets Act

*MSK Client Alert*, September 19, 2011

IRS Updates Rules for Donors and Grantmakers

*MSK Client Alert*, September 12, 2011

California Enforces New Isolationist View on Property Tax Exemptions for Nonprofits

*MSK Client Alert*, August 4, 2011

IRS Backs Off of Gift Tax on 501(c)(4) Contributions

*MSK Client Alert*, July 7, 2011

"Automatic" Excess Benefit Transactions - Fringe Benefits and Other Red Flags

*MSK Client Alert*, June 6, 2011

IRS Audits Employment Tax Compliance by Nonprofits

*MSK Client Alert*, June 1, 2011



Potential Gift Tax Liability for Contributions to 501(c)(4)s - UPDATE #2  
*MSK Client Alert*, May 10, 2011

ACGA Announces New Rates For Charitable Gift Annuities  
*MSK Client Alert*, May 9, 2011

Reminder: New Tax Act Includes Gift Tax Opportunities  
*MSK Client Alert*, February 14, 2011

Using UPMIFA to Release and Modify Restrictions on Charitable Funds  
*MSK Client Alert*, February 10, 2011

Potential Gift Tax Liability for Contributions to 501(c)(4)s - UPDATE  
*MSK Client Alert*, January 27, 2011

IRA Required Minimum Distributions Made in 2010 Cannot Be Rolled Over or Reclassified to Qualify as Charitable Distributions  
*MSK Client Alert*, January 13, 2011

Significant Tax Law Changes Under the New Tax Act  
*MSK Client Alert*, December 20, 2010

Potential Gift Tax Liability for Election Year Contributions to 501(c)(4) Social Welfare (Political?) Organizations  
*MSK Client Alert*, October 14, 2010

The Importance of the "Extenders" Legislation to Charitable Gift Planning  
*MSK Client Alert*, October 2010

IRS Addresses Tax-Exempt Organizations and Gaming  
*MSK Client Alert*, September 7, 2010

IRS Offers Limited Relief for Small Nonprofits  
*MSK Client Alert*, August 2010

Charities and Politics: Navigating the Minefield  
*MSK Client Alert*, March 12, 2010

ACGA Survey of Gift Planning Now Available  
*MSK Client Alert*, December 2008

Raffles -- Are You Breaking the Law?  
Vol. II, No. 4 - 1994

Everything You Ever Wanted to Know about "Type 3" Supporting Organizations  
*MSK Client Alert*, 2000



Bowling Organization Pinned By The IRS

Vol. VII, No. 1 - 1999

Proposed Corporate Sponsorship Regulations

Vol. I, No. 2 - 1993

Tax Bill Provisions Affecting Charities

Vol. I, No. 3 - 1993

Tax Consequences of Exchanging Life Insurance for a Gift Annuity

Vol. II, No. 3 - 1994

Legislative Activities of Public Charities: The 501(h) Election

Vol. II, No. 1 - 1994

Dealing with the Self-Dealing Rules (Part Two)

Vol. V, No. 1 - 1997

Legislative Alert: The 501(k) Election

Vol. II, No. 1 - 1994

Conservation Easements

Vol. V, No. 4 - 1997

Reduction Of The Private Foundation Tax On Investment Income From 2% To 1%

Vol. VI, No. 3 - 1998

Dealing with the Self-Dealing Rules (Part One)

Vol. IV, No. 4 - 1996

In The Government Pipeline

Vol. VI, No. 2 - 1998

Fiduciary Issues Faced By Charitable Organizations (Part One)

Vol. VI, No. 3 - 1998

Residential Rollovers

Vol. III, No. 1 - 1995

Proposed Regulations Make Private Foundations More Public

Vol. VII, No. 4 - 1999

An Overview of the Taxpayer Relief Act of 1997

*MSK Client Alert*, August 2002



Qualified Stock Update

Vol. II, No. 3 - 1994

Charitable Organization Lobbying Activities

Vol. III, No. 4 - 1995

Show and Tell Time For Charities - The New Disclosure Regulations

Vol. VII, No. 4 - 1999

Don't Get Taken For A Ride If You Donate Your Car to Charity

*MSK Client Alert*, April 2001

Overview of the Taxpayer Relief Act of 1997

*MSK Client Alert*, April 2001

New Feature: Letters To The Editor

Vol. XII, No. 2 - 1999

Fiduciary Issues Faced By Charitable Organizations (Part Two)

Vol. VII, No. 1 - 1999

New Federal Tax Legislation -- and Lots of It!

Vol. IV, No. 3 - 1996

Current Rulings of Interest, Terrific Ruling on IRA Excise Tax

Vol. V, No. 3 - 1997

Charitable Sector Letter

*MSK Client Alert*, 2004

Publicity of Charitable Organization Information Requirements

Vol. III, No. 2 - 1995

New Gift Annuity Rates (Part One)

Vol. V, No. 1 - 1997

Study of Charitable Gift Annuities

Vol. III, No. 3 - 1995

Charitable Remainder Trusts Funded with Encumbered Property

Vol. I, No. 1 - 1993

Assembly Bill 21 Legislative Alert

Vol. II, No. 3 - 1994



Federal Legislation

Vol. III, No. 4 - 1995

Congressional Tax Committee Focuses On Commercial Gift Funds

Vol. VI, No. 2 - 1998

Proposed Regulations Would Alter the Definition of Trust Income

*MSK Client Alert*, Vol. IX, No. 1 - 2001

Congress Arms IRS with Intermediate Sanctions Weapon

Vol. IV, No. 3 - 1996

Worksheet for Computation of Debt-Financed Income Arising From Sale of Property

Vol. I, No. 1 - 1993

Regulation Of Charitable Gift Annuities In California

Vol. VII, No. 2 - 1999

Charitable Gifts of Income Interests in Charitable Remainder Trusts

Vol. II, No. 2 - 1994

An Update On The Texas Gift Annuity Litigation

Vol. VI, No. 1 - 1998

New Gift Annuity Rates (Part Two)

Vol. VI, No. 2 - 1998

New & Improved Federal Legislation for Charitable Gift Annuities

Vol. V, No. 3 - 1997

Revision of Uniform Principal and Income Act Affects Net Income Trusts

*MSK Client Alert*, Vol. VIII, No. 1 - 2000

Duties Of The Trustee Of A Charitable Trust To Provide An Accounting To Trust Beneficiaries

Vol. VI, No. 3 - 1998

"Flip" Trusts

Vol. III, No. 2 - 1995

The Atkinson Case: No Good Deed Goes Unpunished

*MSK Client Alert*, August 2001

Immediate Action Required

Vol. VII, No. 1 - 1999



Blame It On The Attorney

Vol. VIII, No. 1 - 2000

Liability Protection for Non-Profit Directors and Officers

Vol. I, No. 3 - 1993

Accelerated CRT: The Empire Strikes Back

Vol. II, No. 4 - 1994

More CRT Regulations!

Vol. VII, No. 4 - 1999

Community Foundation Survey

Vol. IX, No. 1 - 2001

New CRT Regulations Are Final

Vol. VII, No. 1 - 1999

How to Cure A CRT's Failure Of The New 10% Minimum Remainder Requirement

Vol. VI, No. 1 - 1998

Estate Tax Consequences of Pre-1970 Charitable Remainder Trusts

Vol. III, No. 4

"Spigot" Charitable Remainder Trusts

Vol. II, No. 4 - 1994

CRT With A Trust As Income Beneficiary

*MSK Client Alert*, Vol. X, No. 2 - 2002

New Regulations Authorize Flip Unitrusts

*MSK Client Alert*, April 2001

Problem Solving with Gift Annuities (Part One)

Vol. IV, No. 1 - 1996

New Federal Legislation

Vol. IV, No. 1 - 1996

Problem Solving with Gift Annuities (Part Two)

Vol. IV, No. 2 - 1996

Coordinating Charitable Gifts of Retirement Plan Assets With Lifetime Distribution Requirements (Part Two)

Vol. III, No. 3 - 1995



Charitable Gifts of Retirement Plan Assets (Part Two)

Vol. III, No. 2 - 1995

IRS Guidelines for Automobile Donations

*MSK Client Alert*, 2004

Charitable Gifts of Retirement Plan Assets (Part One)

Vol. II, No. 2 - 1994

Charitable Gifts Funded with Options: Myth and Reality

Vol. I, No. 1 - 1993

IRS Relief For Charitable Donors

Vol. III, No. 2 - 1995

Back to the Basics

Vol. IX, No. 1 - 2001

Building Flexibility Into Lead Trusts

Vol. V, No. 4 - 1997

Generation-Skipping Transfer Tax And Charitable Remainder Trusts: An Update

Vol. V, No. 3 - 1997

Generation-Skipping Transfer Tax And Charitable Remainder Trusts: Don't Let This Happen To You

Vol. V, No. 2 - 1997

Drafters of Charitable Bequests Must be Aware of Tax Payment Clause

Vol. IV, No. 3 - 1996

Avoiding Private Foundation Pitfalls

Vol. V, No. 1 - 1997

Revised Charitable Gift Annuity Rates

*MSK Client Alert*, 2002

Charitable Gifts of Depreciated Property (Part Two)

Vol. III, No. 1 - 1995

Coordinating Charitable Gifts of Retirement Plan Assets With Lifetime Distribution Requirements (Part One)

Vol. III, No. 2 - 1995

Charitable Contributions of Commercial Annuity Contracts

Vol. IV, No. 2 - 1996



Enforcement of Charitable Pledges

Vol. I, No. 3 - 1993

Enforcement of Charitable Pledges: The Sequel

Vol. II, No. 1 - 1994

More About Contributions of Commercial Annuity Contract

Vol. IV, No. 4 - 1996

IRS Approves Gift Annuity With Elective Starting Date

Vol. V, No. 3 - 1997

Gift of Appreciated Stock Results in Unexpected (and Onerous) Assignment of Income

Vol. V, No. 2 - 1997

Audits From Hell No Longer Hot

Vol. III, No. 4 - 1995

California AMT Warning

Vol. II, No. 2 - 1994

Donor Bill of Rights

Vol. II, No. 1 - 1994

Legislative Proposals Affecting Charitable Contributions

Vol. I, No. 1 - 1993

Charitable Sector Letter

*MSK Client Alert*, August 21, 2009

Charitable Sector Letter

*MSK Client Alert*, 2007

Charitable Sector Letter

*MSK Client Alert*, 2005

New Tax Act Contains Important Provisions Affecting Charities and Charitable Gift Planning

*MSK Client Alert*, Vol. XIV, No. 1, 2006

Charitable Sector Letter

*MSK Client Alert*, June 2008

New Requirements for CRT Qualification

*MSK Client Alert*, Vol. XIII, No. 2, 2005



Charitable Sector Letter  
*MSK Client Alert*, December 2007

IRA Roll-Over Extended  
*MSK Client Alert*, October 2008

Katrina Tax Act Creates Important Year End Planning Opportunity  
*MSK Client Alert*, Vol. XIII, No. 4, 2005

The 2004 Tax Act: Its Impact on Charitable Giving  
*MSK Client Alert*, August 2005

Congress Extends Charitable IRA Rollover: Additional Useful Information  
*MSK Client Alert*, October 2008

Fixing a Broken Charitable Remainder Trust  
*MSK Client Alert*, March 2007

New Ruling on REIT's in CRT's  
*MSK Client Alert*, March 2007

## events & speaking engagements

Planned Giving & Illiquid Assets: What You Need to Know  
June 5, 2025

Leave 'Em A Dollar, That Should Keep Them in Line: Effective Planning to Avoid Contests  
November 7, 2018

Gifts of Copyrights, Trademarks and other Intellectual Property  
October 18, 2018

HSAs Compliance Obligations Under the Internal Revenue Code and ERISA  
May 30, 2018

Gift Acceptance Policies and Procedures for Nonprofits  
October 18, 2016

Dealing with the Self-Dealing Rules  
October 18, 2016

Avoiding the Proverbial Traps for the Unwary  
October 2, 2013



Making Money: Financial Expert Secrets Revealed  
May 6, 2013

Effective Gift Acceptance Policies and Procedures  
October 5, 2012

Special Tax Rules that Apply to S Corporations Wishing to Develop Charitable Gifts of S Corporation Assets  
September 17, 2012

National Conference on Philanthropic Planning  
October 4, 2011

Policies and Procedures for Acceptance of Property Gifts  
September 26, 2011

CA Professional Fiduciaries Act  
November 11, 2010

UBTI in Charitable Gift Planning  
October 14, 2010

Charitable Gift Planning: Update and Case Studies  
October 6, 2010

The Facts of Life (Estates): Remainder Interests in Residences and Farms  
September 30, 2010

Updated Guide to Donor Advised Funds  
June 2, 2010

The Facts of Life (Estates)  
April 28, 2010

Western Regional Planned Giving Conference  
June 2, 2005

Northern California Planned Giving Conference  
February 18, 2005

National Conference on Planned Giving  
August 16, 2004