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# 12th annual jerry a. kasner estate planning symposium

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Santa Clara University Law School

September 30, 2016

David Newman will be presenting two sessions at the 12th Annual Jerry A. Kasner Estate Planning Symposium on September 30, 2016 at Santa Clara University Law School.

The first session, "Charitable Gifts of Intellectual Property," will summarize the tax treatment of charitable contributions and intellectual property. With the democratization of technology, more people are able to create and transfer intellectual property, including patents, trademarks and copyrights. Charitable contributions of these intangible assets are subject to a surprisingly complex matrix of tax rules governing the tax benefits arising from those contributions. Mr. Newman will discuss rules that must be considered with contributions of intellectual property and the planning dynamics for navigating these rules to plan gifts that will take full advantage of available tax benefits.

In the second session, "The Donor, the Advisor, the Charity and the Gift Complex - Estate Gift Strategies," panelists will present a case study from the My Own Business Institute. This session will provide a detailed look into the evolution of Phil and Peggy Holland's gift to the SCU business school, which resulted in the MOBI Institute becoming a program for entrepreneurship at Santa Clara University.

Moderated by S. Andrew Starbird, PhD, Santa Clara University

#### Panelists

- David Newman, Esq., Mitchell Silberberg & Knupp LLP
- Lawrence Donatoni, Santa Clara University

#### More Information/Registration

#### attorneys

David Wheeler Newman

#### practice areas

tax and trusts & estates  
trusts & estates