



planned giving & illiquid assets: what you need to know

June 5, 2025

12:00 PM - 1:30 PM PT

Event Sponsor: Northern California Planned Giving Council

Jeff Davine will be speaking on the webinar session, "Planned Giving & Illiquid Assets: What You Need to Know" on June 5, 2025 at 12:00 PM. This session is a part of the Heidi Strassburger Masters Program by the Northern Planned Giving Council.

About this session...

Planned giving professionals are often required to evaluate whether a proposed contribution of an asset that is illiquid should be accepted. Illiquid assets include real property as well as interests in closely held corporations, limited liability companies, and partnerships. Before accepting a gift of this type, it is important to understand the tax and non-tax issues associated with these gifts and have a comprehensive list of procedures so that the gift can be properly analyzed. Failing to properly vet the gift can result in unexpected surprises to both the charity and the donor.

For more information and to register, [click here](#).

attorneys

Jeffrey D. Davine

practice areas

nonprofit organizations

tax and trusts & estates