



10 CHARITABLE PLANNING IDEAS THAT CAN TURN ANY CLIENT INTO A PHILANTHROPIST

November 2016

Author: Patricia R. Beauregard

In this presentation, Patricia R. Beauregard, a trusts and estates attorney with Cummings & Lockwood, discusses 10 charitable planning ideas that can turn any client into a philanthropist. Specifically, she focuses on charitable planning ideas for clients throughout their lifetime, at their death, and as a legacy that continues with their family for generations. (18:44)

Presentation Outline

1. Outright Gifts of Cash or Appreciated Securities
2. Charitable Gift Pledge
3. Bequest in Your Will to Take Effect at Death
4. Beneficiary Designations
 - a. Introduction to Charitable Remainder Trusts
5. Charitable Remainder Unitrust ("CRUT")
6. Charitable Remainder Annuity Trust ("CRAT")
7. Donor-Advised Fund
8. Endowment Fund
9. Private Foundation
10. Public Charity