



Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors

By Roger D. Silk, James W. Lintott

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The insider's guide to charitable organizations for donors and their advisors

Do you know when to use a private foundation, a donor-advised fund, or a charitable remainder trust or other charitable vehicle? Do you know the different tax benefits, limitations, and control rules for each alternative? Do you have an appropriate investment policy for your endowed charities? Do you have a rubric for avoiding fraud? Do you know what to look for to make sure that your charitable donations don't do the opposite of what you intend?

In *Managing Foundations and Charitable Trusts*, Roger D. Silk and James W. Lintott provide a comprehensive guide for charitable donors and their advisers. Additional topics include:

- Foundation Governance
- When to seek additional professional help
- When and how to turn a CRT interest into cash
- Key tax issues
- Creating a legacy
- Why tax planning is so difficult, and how to approach it

Straightforward and authoritative, *Managing Foundations and Charitable Trusts* is a handy, easy-to-read guide that all donors and their advisers will want to keep on hand.

Q&A with the Authors

Since the first edition of *Creating a Private Foundation* published in 2003, how has the foundation and charitable trust industry changed and evolved?

The past decade has been a difficult one in several important ways. The investment environment has been very challenging, making investment policy and cash management even more important than in some previous periods. Fraud has hit many charities and foundations, some with devastating consequences,

reinforcing with a sledge-hammer the importance of due diligence. The concept of unintended consequences has been shown to apply to charitable giving, causing many donors for the first time to consider that their giving might do harm if not carefully considered. Donor-advised funds have grown in importance, and the regulations surrounding them have grown as well. Finally, one of the biggest changes is the development of a market for income interests in Charitable Remainder Trusts. Whereas previously CRT donors were pretty much stuck with such income interests for life, there is now liquidity, meaning that if a CRT donor's situation changes, he can turn his income stream into a lump sum of cash.

What will donors and advisors gain from reading this new edition?

In this book we address the impacts of all the above changes, among others. Many advisors tell us that they have not seen these issues dealt with elsewhere, or not as usefully.

What is the biggest or most important takeaway that you hope readers walk away with after finishing the book?

The size of the charitable sector continues to grow, and along with that opportunities and complexity also grow. We hope that our readers will take away a better understanding of what to do, what not to do, and when to call in expert help.

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Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott Bibliography

- Sales Rank: #66875 in Books
- Published on: 2011-08-09
- Original language: English
- Number of items: 1
- Dimensions: 9.00" h x 1.30" w x 6.20" l, 1.15 pounds
- Binding: Hardcover
- 288 pages

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