



# Tools & Techniques of Charitable Planning (Tools & Techniques)

*Stephan R. Leimberg, Jim Allen, Johnine R. Hays, J. J. MacNab, Roger L. Shumaker*

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**Tools & Techniques of Charitable Planning (Tools & Techniques)** Stephan R. Leimberg, Jim Allen, Johnine R. Hays, J. J. MacNab, Roger L. Shumaker

Harvest an understanding of: why people give to charities; features and benefits of charitable giving plans; legislation that governs charitable giving. Numerous charts, graphs, and tables illustrate from the basic charitable deduction rules to the most complex charitable giving techniques: Income rules & limits; critical valuation uses & potential ethical pitfalls; software & technology; private versus community foundations; Charitable annuities, trusts, funds & life insurance.

Broad coverage of charitable giving vehicles and techniques:

Income rules & limits in easy-to-understand language

Emphasis on critical valuation uses & potential ethical pitfalls

Charitable giving software & technology issues

Private versus community foundations

Charitable annuities, trusts, funds & life insurance

Newly Revised 2nd Edition of Tools & Techniques of Charitable Planning consists of the latest coverage on continued IRS scrutiny of tax-exempt organizations, continuing congressional reforms directed toward tax-exempt organizations, mounting number of restrictions directed toward charity owned life insurance (CHOLI), and prohibitions against tax-exempt organizations being involved in tax shelters a knowledge base you will soon discover useful long after the first read. Features several new sample documents for CRTs to save you time and keep you in compliance. Life Insurance, PACE, and CFP® CE Filed.

Don't miss out on the latest opportunities with your practice:

Pension Protection Act of 2006

Conservation/ Façade easements

Clothing/Household item donations

Auto-enrollment into 401(k) plans permitted

Increased exempt organization reporting

Overvaluation penalties

Recapture of unrelated use tangible personal property gifts

Gifts of fractional interests in tangible personal property

Appraisal forms

Charitable IRA rollovers

Private foundation reforms

S Corporation contributions

Donor-advised fund reforms

Excise Taxes

CRT reporting

Tax Relief and Health Care Act of 2006

Charitable Trust Distribution Final Regulations  
Final Regulations Defining Trust Income (CRUTs/pooled income funds)  
Chapters to feature: the top 12

Charitable Remainder Unitrusts  
Income Percentage Limits  
Gifts of Property  
Partial Interest Rules  
Charitable Giving Using Life Insurance  
Ethical Issues in Charitable Planning  
Charitable Lead Trusts  
Donor Advised Funds  
Bargain Sale Transactions  
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Testimonials

In each of our books we had one major goal in mind: To create the single best source of up-to-date, pragmatic and transferable information on the topics you need to help others.

Stephan R. Leimberg, Lead Author of Tools & Techniques

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