

Estate Planning & Charitable Giving

FPLG understands the complexities of estate planning, and we align with philanthropists seeking not only to protect their family's assets, but also to contribute a share of the bounty of their life's work to charitable causes.

You don't have to be extremely wealthy to be a philanthropist; you just have to care deeply enough about an issue to be willing to contribute your financial resources to make a difference in the world.

When you're ready to memorialize and formalize how you wish to protect your assets, your children, and to strategize how best to maximize your charitable impact, FPLG is here to assist.

Estate Planning

Your estate is more than the money you've accumulated over time. Your estate includes your loved ones, your philanthropic interests, and your business endeavors. FPLG is a firm that represents individuals and families, and we understand your estate includes much more than just money. We have the understanding, knowledge, experience, and expertise to ensure your entire estate is protected. Estate planning is planning for the inevitable; death will come for us all. But as we all know, a goal without a plan is just a wish.

Charitable Tax Planning

Giving to charity not only makes a positive impact on the world and individual communities, but it can also positively affect your tax burden if implemented correctly. Charitable remainder trusts and charitable lead trusts are just two potential options for both lifetime and legacy giving, but it's often difficult to recognize the best time to employ various strategies, or to decide upon which ones work best in your situation. FPLG's tax and estate planning professionals can advise you in crafting the best giving strategy to implement your charitable goals and maximize your tax savings during your lifetime and beyond.

Foreign Grantmaking

The United States has been consistently ranked as one of the most philanthropic countries in the world by the [World Giving Index](#). When an individual donor or private foundation focuses on making specific, measurable impact they often make substantial monetary grants, either within the United States or in foreign jurisdictions. This transfer of charitable funds carries great compliance responsibility, including expenditure responsibility, equivalency determinations and compliance with

the Office of Foreign Asset Control (OFAC). FPLG's tax and compliance team understands the regulations, and can ensure grantmakers remain in compliance.

Asset Protection Planning

Asset protection trusts are typically established by individuals in high risk occupations (i.e., doctors and real estate developers) and very wealthy individuals that realize they are targets for creditors due to their net worth. In certain situations an asset protection trust can be used to eliminate or reduce the imposition of state income taxes. An asset protection trust may also be used to remove assets from a grantor's estate while still allowing the grantor to potentially benefit from the trust assets. FPLG's tax and estate planning professionals are uniquely qualified to assist you.

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