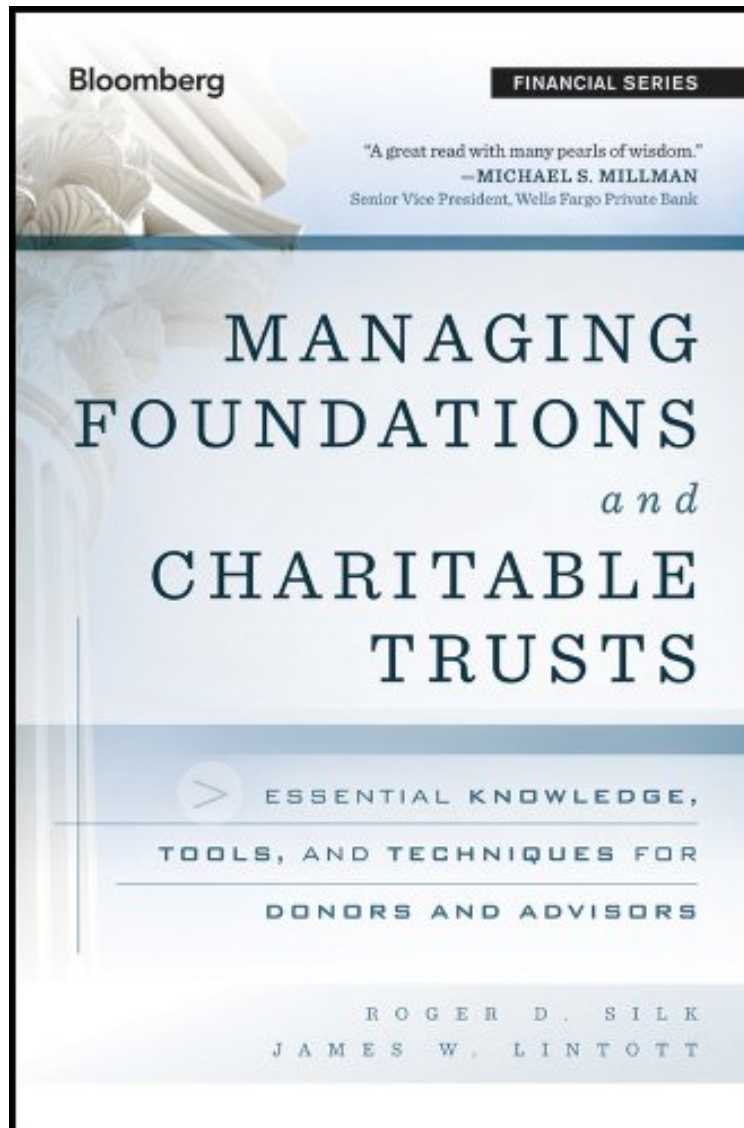


[PDF] Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors (Bloomberg Financial)

# Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors (Bloomberg Financial)

*Roger D. Silk, James W. Lintott*

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**Roger D. Silk, James W. Lintott : Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors (Bloomberg Financial)** before purchasing it in order to gage whether or not it would be worth my time, and all praised Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors (Bloomberg Financial):

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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 advisors will want to keep on hand.

From the Inside Flap Establishing a private foundation is an excellent way to build a permanent legacy while helping your community and also allowing you to benefit from tax exemptions. Almost 5 percent of high-net-worth individuals have already set up foundations, and interest in setting up charitable organizations is on the rise. But knowing where to start can present a major challenge. In *Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors*, Roger Silk and James Lintott provide a comprehensive guide for charitable donors and their advisors that includes coverage of the latest topics facing today's foundation builders, such as avoiding fraud, terminating charitable gifts, and tax issues. Straightforward and authoritative, *Managing Foundations and Charitable Trusts* provides essential guidance that anyone thinking about setting up or advising on the establishment of a private foundation will benefit from. Covering the four approaches to philanthropy—direct gifts, supporting organizations, donor-advised funds, and private foundations—and highlighting and explaining the reasons for establishing a foundation in the first place, the steps for setting one up, and tips for avoiding common pitfalls, the book is a wealth of information on one of the hottest options for estate management available today.

From the Back Cover Praise for *Managing Foundations and Charitable Trusts* "This remarkably readable, yet complete and authoritative book helps guide both novices and experts through these potentially confusing areas. Anyone who has a foundation or a CRT (or is considering one) will find it helpful." —Jerry J. McCoy, editor, *Family Foundation Advisor* "Roger Silk and James Lintott have unpacked the maze of giving strategies into a practical, easy-to-understand manual, which is full of examples and useful tips for both donors and advisors." —Norman F. Manley, CPA, BDO Seidman, LLP "[T]he book was both informative and entertaining to read. I congratulate [the authors] on bringing a new resource into the world of philanthropy." —Jack Sawyer, partner, Alston Bird LLP "Advisors will enjoy having such a 'complete summary of charitable planning techniques' in their library." —Todd S. Healy, CLU, ChFC, AEP, HealyPartners "[This book] will prove . . . invaluable for the guidance of donor/trustees . . . in management of [a] foundation or trust. The language employed is easily understandable by nonprofessionals but is technically sufficient for the more advanced donor/trustee. The device of presenting and analyzing interesting cases makes this work particularly readable." —William Linkous Jr., Of Counsel, Bryan Cave LLP

About the Author Roger D. Silk, CEO of Sterling Foundation Management, is widely recognized as a leading expert in the field of private foundations and charitable trusts. As a founder and board member of several nonprofit organizations, former bond trader at the World Bank, and Stanford-trained PhD economist, Dr. Silk possesses a unique blend of experience, practical knowledge, and theoretical insight that has enabled him to help build Sterling Foundation Management into the market leader that it is today. James W. Lintott is Chairman of Sterling Foundation Management and a board member of Dean and DeLuca and several private investment companies. He has over two decades of experience working with wealthy individuals and families. In addition, Mr. Lintott serves on the boards of a number of nationally recognized charities, including the Freer/Sackler Galleries of the Smithsonian Institution, the U.S.-Japan Foundation, and Best Buddies International.