

Charitable Planning

Whether you want to advance a cause, give back to the community, leave a lasting legacy, or reduce your taxes, these goals can be achieved through charitable planning. However, it is crucial for donors to consult with an estate planning attorney prior to making charitable donations due to complex IRS regulations for charitable giving. **How We Can Help**

Tully Rinckey PLLC's estate planning attorneys in Syracuse, N.Y.

have a broad array of personalized giving strategies they can use to help donors meet their charitable goals and maximize their income tax, capital gains tax and/or estate tax savings. Our charitable planning lawyers can help donors with any of the following matters: Charitable Lead Trust:

See our Trusts

page. Charitable Life Insurance:

This tool allows a donor to name a charity as the beneficiary of a life insurance policy or transfer ownership of an existing policy to the charity. Charitable Remainder Trust:

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page. Donor-Advised Funds:

A third-party administered private fund comprised of assets from a donor who can provide recommendations on future charitable gifts and investment options. The initial gift provides tax deductions and is irrevocable. Gift Annuities:

Using his or her own money, a client sets up a donor fund which allows the donor to receive annuity payments from the charity for a charitable gift. The donor may receive a partial income tax deduction and the assets are exempted from the estate tax. Pooled-Income Fund:

This type of fund allows a donor to combine his or her assets with those from other donors whom receive income from the pooled fund. Assets in the fund are transferred to the donor's designated charity when their donor dies. Testamentary Request:

Generally, a tax-exempt charitable gift which is made in a will or revocable living trust. Call a Tully Rinckey PLLC charitable planning lawyer in Syracuse, N.Y.

We are available to represent individuals throughout Central New York, including Syracuse, Cicero, North Syracuse, Manlius, Liverpool, East Syracuse, Cazenovia, Skaneateles, Baldwinsville, Utica, New Hartford, Fayetteville and DeWitt.

To schedule a meeting with a charitable planning attorney, call 315-492-4700 or e-mail info@tullylegal.com

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here

to view a video about our consultation process.

Our office is located in Franklin Square, near exits for I-81 and I-690,
with free parking available for firm clients.

If your legal matter is urgent, call 518-727-3593 to speak to an attorney 24 hours a day, seven days a week. The firm is responsive to the needs of current and prospective clients and will respond to phone calls within normal business hours and e-mails within hours on the same business day. If you call or e-mail us after hours, you should expect to hear from our office by the next business day.

