



Exempt Organizations & Charitable Giving

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"To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter."

- Aristotle

Strategic and thoughtful philanthropy is not an easy matter. Whether you require assistance in planning your own charitable contributions, or you're responsible for complying with the very technical and increasingly complex rules that govern the nonprofit sector, Ivins, Phillips & Barker can help you achieve your charitable goals.

For decades, our firm has worked with family foundations and other tax-exempt entities, providing guidance on sophisticated transactions as well as day-to-day matters. We assist with the full range of legal and operational issues that such entities confront, from formation to dissolution. We regularly advise on issues such as self-dealing, maintaining exemption, unrelated business income, lobbying, and program-related investments.

In conjunction with our business tax practice, we have experience assisting major corporations with their philanthropy initiatives and company-sponsored private foundations. There are numerous ways that businesses can leverage their philanthropic investments to further their community involvement goals, including employee matching gift programs, scholarship and disaster relief funds, cause-based marketing campaigns and sponsorships, and community development joint ventures. We assist companies in formulating innovative corporate giving strategies and managing the associated legal compliance issues.

We also advise private individuals on their planned giving strategies, helping them structure charitable gifts and bequests in the manner that most effectively implements their philanthropic goals and donor intent while maximizing the potential tax benefits.



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SAMPLE EXEMPT ORGANIZATION CLIENTS

- American Manufacturing Trade Action Coalition
- Bayer Foundation
- General Motors Foundation
- International Cemetery, Cremation and Funeral Association
- Jacobs Engineering Foundation
- Matrix Biology Institute
- Morris & Gwendolyn Cafritz Foundation
- S.C. Johnson Fund
- Welfare Foundation

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