

Charla Burchett Speaks Before the Charitable Gift Planners of Southwest Florida

Sarasota
10.24.23

Charla Burchett, a partner in Shutts & Bowen LLP's Sarasota office, was recently a featured speaker during the Annual Meeting for the Charitable Gift Planners of Southwest Florida on October 19, 2023.

Speaking during the featured session were legal, insurance and non-profit professionals, including Charla, Taylor Collins (President of Professional Benefits Inc.) and Tom Waters (President and CEO of Easterseals Southwest Florida). The interactive discussion between the panelists and attendees served to show how working together as a team can yield positive results in the non-profit world. Charitable gifts which use life insurance as a wealth replacement vehicle and gifts utilizing charitable remainder or charitable lead trusts can create significant impacts for a non-profit, and working with your insurance and estate planning colleagues can really open up a world of giving opportunities that are often overlooked. These conversations within the gifting team can turn a small gift into a life changing opportunity and build a legacy for both the donor and non-profit.

For more information, click [here](#).

About Charla M. Burchett

Charla M. Burchett is a partner in the Sarasota office of Shutts & Bowen LLP, where she is a member of the Private Client Services Practice Group. A Martindale-Hubbell AV® Preeminent™ rated attorney, Charla is a Board Certified Specialist in Wills, Trusts and Estates as certified by The Florida Bar. She has more than thirty years of experience assisting clients through challenging decisions and difficult times to preserve their legacies across generations. She focuses her practice on estate planning, estate and gift taxation, estate administration, and trust administration.

Professionals

Charla M. Burchett

Practice Areas

Private Client Services



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Trusts and Estates

Offices

Sarasota