



# Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors

By Roger D. Silk, James W. Lintott



**Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors** By Roger D. Silk, James W. Lintott

**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 advisors. 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.

---

## Q&A with the Authors

**Since the first edition of *Creating a Private Foundation* published in 2003, how has the foundation and charitable trust industry changed and evolved?**

The past decade has been a difficult one in several important ways. The investment environment has been very challenging, making investment policy and cash management even more important than in some previous periods. Fraud has hit many charities and foundations, some with devastating consequences, reinforcing with a sledge-hammer the importance of due diligence. The concept of unintended consequences has been shown to apply to charitable giving, causing many donors for the first time to consider that their giving might do harm

if not carefully considered. Donor-advised funds have grown in importance, and the regulations surrounding them have grown as well. Finally, one of the biggest changes is the development of a market for income interests in Charitable Remainder Trusts. Whereas previously CRT donors were pretty much stuck with such income interests for life, there is now liquidity, meaning that if a CRT donor's situation changes, he can turn his income stream into a lump sum of cash.

**What will donors and advisors gain from reading this new edition?**

In this book we address the impacts of all the above changes, among others. Many advisors tell us that they have not seen these issues dealt with elsewhere, or not as usefully.

**What is the biggest or most important takeaway that you hope readers walk away with after finishing the book?**

The size of the charitable sector continues to grow, and along with that opportunities and complexity also grow. We hope that our readers will take away a better understanding of what to do, what not to do, and when to call in expert help.

---

 [Download Managing Foundations and Charitable Trusts: Essent ...pdf](#)

 [Read Online Managing Foundations and Charitable Trusts: Esse ...pdf](#)

# Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors

By Roger D. Silk, James W. Lintott

**Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors** By Roger D. Silk, James W. Lintott

**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 advisors. 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.

---

## Q&A with the Authors

**Since the first edition of *Creating a Private Foundation* published in 2003, how has the foundation and charitable trust industry changed and evolved?**

The past decade has been a difficult one in several important ways. The investment environment has been very challenging, making investment policy and cash management even more important than in some previous periods. Fraud has hit many charities and foundations, some with devastating consequences, reinforcing with a sledge-hammer the importance of due diligence. The concept of unintended consequences has been shown to apply to charitable giving, causing many donors for the first time to consider that their giving might do harm if not carefully considered. Donor-advised funds have grown in importance, and the regulations surrounding them have grown as well. Finally, one of the biggest changes is the development of a market for income interests in Charitable Remainder Trusts. Whereas previously CRT donors were pretty much stuck with such income interests for life, there is now liquidity, meaning that if a CRT donor's situation changes, he can turn his income stream into a lump sum of cash.

**What will donors and advisors gain from reading this new edition?**

In this book we address the impacts of all the above changes, among others. Many advisors tell us that they have not seen these issues dealt with elsewhere, or not as usefully.

**What is the biggest or most important takeaway that you hope readers walk away with after finishing the book?**

The size of the charitable sector continues to grow, and along with that opportunities and complexity also grow. We hope that our readers will take away a better understanding of what to do, what not to do, and when to call in expert help.

---

**Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott Bibliography**

- Sales Rank: #66875 in Books
- Published on: 2011-08-09
- Original language: English
- Number of items: 1
- Dimensions: 9.00" h x 1.30" w x 6.20" l, 1.15 pounds
- Binding: Hardcover
- 288 pages

 [Download Managing Foundations and Charitable Trusts: Essent ...pdf](#)

 [Read Online Managing Foundations and Charitable Trusts: Esse ...pdf](#)

## **Download and Read Free Online Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott**

---

### **Editorial Review**

### **Users Review**

#### **From reader reviews:**

#### **Guadalupe Baxter:**

Here thing why this particular Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors are different and dependable to be yours. First of all examining a book is good nonetheless it depends in the content of the usb ports which is the content is as yummy as food or not. Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors giving you information deeper and in different ways, you can find any reserve out there but there is no guide that similar with Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors. It gives you thrill examining journey, its open up your current eyes about the thing that will happened in the world which is maybe can be happened around you. You can easily bring everywhere like in playground, café, or even in your approach home by train. In case you are having difficulties in bringing the imprinted book maybe the form of Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors in e-book can be your substitute.

#### **Russell Diamond:**

Information is provisions for those to get better life, information currently can get by anyone from everywhere. The information can be a expertise or any news even restricted. What people must be consider when those information which is inside the former life are challenging to be find than now's taking seriously which one is acceptable to believe or which one the particular resource are convinced. If you find the unstable resource then you buy it as your main information we will see huge disadvantage for you. All those possibilities will not happen inside you if you take Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors as the daily resource information.

#### **Anthony Davidson:**

The actual book Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors will bring you to definitely the new experience of reading some sort of book. The author style to spell out the idea is very unique. Should you try to find new book to see, this book very suited to you. The book Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors is much recommended to you to study. You can also get the e-book from the official web site, so you can more readily to read the book.

**Harold Phillips:**

Spent a free time for you to be fun activity to perform! A lot of people spent their sparetime with their family, or their very own friends. Usually they performing activity like watching television, likely to beach, or picnic inside park. They actually doing same every week. Do you feel it? Will you something different to fill your own free time/ holiday? Could possibly be reading a book could be option to fill your no cost time/ holiday. The first thing you will ask may be what kinds of book that you should read. If you want to consider look for book, may be the reserve untitled Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors can be excellent book to read. May be it might be best activity to you.

**Download and Read Online Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott #U9YNSQZ076X**

## **Read Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott for online ebook**

Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott Free PDF d0wnl0ad, audio books, books to read, good books to read, cheap books, good books, online books, books online, book reviews epub, read books online, books to read online, online library, greatbooks to read, PDF best books to read, top books to read Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott books to read online.

### **Online Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott ebook PDF download**

**Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott Doc**

**Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott Mobipocket**

**Managing Foundations and Charitable Trusts: Essential Knowledge, Tools, and Techniques for Donors and Advisors By Roger D. Silk, James W. Lintott EPub**