

Carter Ledyard Partners Karen T. Schiele and Alison Powers Herman Present CLE on Testamentary Charitable Giving for American Heart Association

May 03, 2023

Karen T. Schiele and Alison Powers Herman presented a program titled, "Structuring Effective and Tax-Efficient Testamentary Charitable Gifts" on April 26, 2023 for American Heart Association's 21st annual New York Trusts and Estates Conference. The presentation reviewed the requirements for securing an estate tax charitable deduction, outlined structures and best practices for charitable testamentary gifts, and provided guidance on choosing assets for such gifts. Karen and Alison were grateful for the opportunity to discuss this important estate planning topic with peers in the New York Trusts & Estates community and delighted to partner with American Heart Association.

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