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Estate Planning & Probate Section

Drafting Charitable Gift Agreements to Stand the Test of Time

By Mairin A. McGinley, Morgan & DiSalvo, P.C.



The Estate Planning and Probate Section of the Atlanta Bar Association was delighted to host Alan F. Rothschild, Jr., Esq. of Page, Scrantom, Sprouse, Tucker & Ford, P.C. as the featured speaker at the June 8, 2016 section breakfast. Mr. Rothschild drew upon his 30 years as an estate planner, including 10 years of experience in drafting charitable gifts, to share with the Section the importance of drafting charitable gift agreements in ways that survive the test of time.

Mr. Rothschild began by noting that, from the standpoint of a nonprofit, the perfect gift would be a cash gift with no restrictions as to its use. That said, such is rarely the case, as donors usually want their gifts used for specific purposes, or allocated to specific programs or projects. Therefore, it is important to talk with donor clients about the necessity for legal documentation of any restrictions on the use of the gift.

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Richard M. Morgan and Melissa P. Walker Discuss Wills vs. Revocable Trusts in Estate Planning

By Allison L. Byrd, Allison Byrd Law, LLC



The Estate Planning and Probate Section of the Atlanta Bar Association welcomed Richard M. Morgan of Morgan & DiSalvo, P.C. and Melissa P. Walker of Salo & Walker at the September 14, 2016 section breakfast, to discuss "Wills vs. Revocable Trusts" as estate planning tools. While not quite the "epic showdown" that was expected, the presentation was, nevertheless, a spirited and informative debate over the relative advantages and disadvantages of those two modes of estate planning.



Most people think of Last Wills and Testaments when considering how to pass on

their wealth to subsequent generations or other beneficiaries. A Will is simply a legal document in which a person (the "testator") states who should receive the testator's possessions after the testator dies.

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Charitable Planning in 2016

By Clay Skinner, Vantage Point South - The Skinner Law Firm, LLC



The Estate Planning & Probate Section of the Atlanta Bar Association was pleased to welcome Christy Eckoff, Director of Gift Planning with the Community Foundation for Greater Atlanta, at the May 11, 2016 section breakfast. Ms. Eckoff's presentation was on "Charitable Planning in 2016"

and focused on three major points: the role of the Community Foundation across metro Atlanta; trends in Atlanta and nationally in charitable giving; and tips and clarifications for those working with clients looking to make charitable gifts.

With over \$930 million in assets and approximately \$100 million per year in grants to nonprofit

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organizations, the Community Foundation for Greater Atlanta has built a reputation as one of the leading community foundations in the country. It is the second largest in the southeast, and in the top 20 nationwide. The primary impact areas of the Community Foundation include Arts, Community Development, Education, Health and Human Services, and Nonprofit Effectiveness. Two new areas the Community Foundation is developing include a...

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Estate Planning or Exit Planning: Which Comes First?

By Mairin A. McGinley, *Morgan & DiSalvo, P.C.*



The Estate Planning and Probate Section of the Atlanta Bar Association was pleased to host Certified Exit Planning Specialist Denis Brown of Pace Capital Advisors, LLC as the guest speaker at the August 10, 2016 section breakfast. Mr. Brown shared his expertise, gained through over 100 transactions as a buyer, seller, investor, advisor or financier of businesses, by discussing the many overlapping issues involved in estate planning and exit planning.

Mr. Brown introduced his discussion by observing the basic commonality of exit planning and estate planning goals:

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