Charitable Planning

We work with individuals and families to meet their philanthropic goals and educate the next generation.

In this regard, we work with our individual clients to employ charitable giving techniques, such as Charitable Remainder Trusts and Charitable Lead Trusts, to preserve assets for, and transfer assets to, family members while supporting charitable organizations and activities. We also have extensive experience working with charitable and other non-profit organizations, including donor-advised funds and private foundations, in issues related to planned giving.

RELATED ATTORNEYS

Melissa S. Hung, Senior Counsel

Florence M. Jao, Partner

Sonja K. Johnson, Counsel

Patrick R. McCabe, Partner

Danielle T. Zaragoza, Partner

© 2026 Shartsis Friese LLP | All Rights Reserved |