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Understanding Gift Agreements: Essential Insights for Donors

As the year draws to a close, many donors are thinking about their charitable goals, especially in light of strong market performance. Gift agreements can play an important role in this process, helping to clarify the intent behind a donation and ensuring that both the donor and the charitable organization understand their obligations. In this episode of the Choate Family Office podcast series, Sarah Tomeo Hertzog, Kate Toth, and Jessica Welch discuss when a gift agreement is necessary, potential legal implications, financial aspects of charitable giving, and common surprises that donors encounter.

In addition to this podcast, Choate Wealth has also published other helpful guides in this area:

Donors Take Care-How to Avoid Charitable Giving Scams

Save Your Receipts

Year-End Charitable Giving with Donor Advised Funds

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