



# Partner Stephen Pagano Speaks On Charitable Giving Strategies for Legacy and Estate Planning

Stephen J. Pagano, a partner in the Firm's Tax and Trusts and Estates Group, was a speaker at the Financial Planning Association of New Jersey's June 4, 2019 dinner meeting. The event, entitled "Charitable Giving Strategies for Legacy and Estate Planning," was held at the Apa Hotel Woodbridge in Iselin and provided guidance on legacy gifts including tax and legal ramifications.

The presentation covered:

- How to determine a client's legacy objectives
- The techniques of creating a legacy/endowment gift and which technique is appropriate for which client
- How to utilize insurance and annuities to perpetuate a legacy gift
- The proper legal documents necessary to protect their client and their gift
- The tax impact on the client of current and future legacy giftsest

Click [here](#) for more information.

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