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# Family Foundation Handbook

*Jerry J. McCoy, Kathryn W. Miree*  
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#3581027 in Books Summers Press 2002-05Original language:EnglishPDF # 1 1.73 x 6.40 x 9.20l, #File Name: 0735516456752 pages | File size: 77.Mb

**Jerry J. McCoy, Kathryn W. Miree : Family Foundation Handbook** before purchasing it in order to gage whether or not it would be worth my time, and all praised Family Foundation Handbook:

The Family Foundation Handbook provides comprehensive coverage of the legal, tax, and business aspects of forming and operating a family foundation. From grantmaking to investment management, accounting procedures to tax filings, and funding the foundation to protecting it from liability, this handbook provides coverage of all the issues a family foundation faces. This valuable resource provides forms, checklists, questionnaires, training forms, and other items to help provide the professional assistance every foundation needs. \* Updated coverage of the Pension Protection Act of 2006 changes and post-enactment developments, including IRS Guidesheets and Explanations on supporting organizations \* Dealing with your supporting organization after it becomes a private foundation \* Engaging younger generations through Kitchen Table Philanthropy \* Comparing the options available to the family contemplating a family foundation after the Pension Protection Act of 2006 \* The most recent statistics of family foundation trends and profiles from The Foundation Center, the Council on Foundations, the Association of Small Foundations, the Giving USA Foundation, and the Internal Revenue Service. \* New and expanded court cases addressing private foundation issues from the Tax Courts and the IRS. \* News stories focusing on private foundation litigation and cautionary tales of foundation manager liability. \* The latest data on staff salaries and guidelines. \*

Updated lists of foundation resources including charitable trade groups, online research sites, international grantmaking entities, socially responsible investment firms, administrative software, and more. \* A review of the new Uniform Prudent Management of Institutional Funds Act (UPMIFA) and progress in adopting UPMIFA across the country.

About the Author Jerry J. McCoy, Esq. is an independent attorney in Washington, D.C., specializing in charitable tax planning, tax-exempt Organizations, and estate planning. He holds law degrees from Duke University and New York University. A member of the American Law Institute and a fellow of both the American College of Trust and Estate Counsel (ACTEC) and the American College of Tax Counsel, Mr. McCoy is listed in Who's Who in America, Who's Who in American Law, and The Best Lawyers in America. A frequent presenter at planned giving, tax, and estate planning seminars, he serves on the adjunct faculties at the Georgetown University Law Center and the University of Miami Law School. He is chairman of the Charitable Planning and Exempt Organizations Committee of ACTEC.

Kathryn W. Miree, Esq. is president of Kathryn W. Miree Associates, Inc., a consulting firm that works with nonprofits to develop planned giving programs. She received her undergraduate degree from Emory University and her law degree from The University of Alabama School of Law. She spent 15 years in various positions, including manager of the Personal Trust Department, in the Trust Division of a large bank. During her tenure with the bank, Ms. Miree handled estate, charitable trust, and foundation administration. She joined a regional brokerage firm in 1994 to start its trust company. She established Kathryn W. Miree Associates, Inc. in 1997. Ms. Miree is a past president of the National Committee on Planned Giving, the founding president of the Alabama Planned Giving Council, a past president of the Estate Planning Council of Birmingham, Inc., and a past member of the Board of the National Association of Estate Planners Councils.