

Complex Assets: The Most Overlooked Charitable Donations

Join Us for Lunch

Wednesday, October 12, 2011
From 11:30 a.m. to 1:30 p.m.

The University Club of Chicago
76 East Monroe Street
Chicago, Illinois 60603

Hosted valet parking available

[Get directions](#)

[Self Register >>](#)

Or email [Jessica Danforth](#) directly.

This program qualifies for 1 CPE credit & 1.25 IL CLE credit.

Learn about the power of complex asset donations

You're invited to hear from the experts why complex asset donations are the best, most tax-efficient sources for your client's philanthropy and how to opportunistically integrate this strategy — and leverage a donor-advised fund program — to increase the net benefit to your client's charities.

Exploring the intricacies of the asset selection and donation process, the panel will emphasize key considerations including timing, valuation, and liquidation issues. Complex assets to be addressed include:

- Closely-held business interests (both C- and S-Corp stock)
- Limited partnership interests
- Real estate
- Other hard-to-value assets

[Learn more about making complex asset donations](#)

Moderator



Karla D'Alleva Valas

Karla D'Alleva Valas is managing director of the Complex Asset Group for Fidelity Charitable, an independent public charity with a donor-advised fund program. [More](#)

Panelists

David A. Berek

Mr. Berek is a Partner in the Advanced Planning and Family Office Practice Group at Handler Thayer, LLP. He focuses his practice on Family Office Structuring and Administration, Wealth Transfer Planning, Income Tax Planning, and Trusts & Estates. [More](#)

Tina Milligan

Tina Milligan, Partner with Baker Tilly Virchow Krause, LLP, is a

member of the Private Client Group. She has more than 18 years of experience in estate, gift, fiduciary, and individual income tax planning, as well as retirement, corporate executive, business succession, wealth transfer, and charitable planning. Prior to joining the firm, Tina worked at financial institutions and a national accounting firm, helping clients with planning. [More](#)

Ralph Pike

Ralph Pike, with over 16 years of experience in serving clients, practices in the firm's Private Client Services area with a concentration on individual income, estate and gift taxation. [More](#)

Mary Lee Turk

Mary Lee focuses her practice on the representation of high net worth individuals, in all aspects of their estate planning needs, with particular focus on charitable planned giving and planning for collectibles. She works closely with individuals and families to structure charitable giving which achieves both personal goals as well as beneficial tax treatment using a variety of tools available, including donor advised funds, charitable split interest trusts, restricted gifts, conservation easements and private foundations. [More](#)
