

# SERVICES

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## Tax Exempt Organizations

The Tax Group advises clients desiring to establish nonprofit organizations regarding various matters relating to their structure, formation and operations, whether the organization is a joint venture between an existing nonprofit and another entity or a private family foundation. We represent a broad range of nonprofit organizations including charitable, trade associations, health care providers, community organizations, educational institutions and foundations. The issues include the tax exempt qualification, unrelated business tax, excise tax advice, governance and policy adoption and implementation and many other issues. We have advised organizations on the necessary changes prompted by the new reporting obligations of the Form 990 and assisted organizations with the compliance requirements. In addition, the Tax Group has assisted nonprofit organizations in the creation of planned giving programs, as well as, together with the trust and estate department, advised donors and charitable organizations regarding charitable giving transactions.

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