



Mastering complex giving: A financial advisor's success story



Matt is a brilliant financial advisor in Chicago, Illinois who serves ultra-high-net-worth clients at one of the top wealth management practices in the U.S. He was recently perplexed because one of his clients, Don, needed a sophisticated giving strategy for a complicated donation of an operating partnership unit that he wanted to convert to publicly traded stock.

Though Matt knew the mechanics of converting the partnership unit to the publicly traded stock, he needed a sophisticated ally to navigate the complexities of this donation and complete the conversion with charitable benefits.

Matt was relieved when he found a solution that offered benefits to Don's business as well as Don's charitably minded partners. This gave Matt the chance to bring in more assets under management by working with new eligible partners in the future. By leveraging Ren's experts and resources, Matt was able to present Don with a solution in the form of a donor-advised fund (DAF). This giving vehicle provided a bridge to convert these complex assets. A DAF allowed Matt to complete the conversion while relieving Don from the responsibility of capital gains taxes, maximizing his tax benefits, and supporting the causes he and his partners care about.

► **Get in touch today to learn how Ren can help your clients donate complex assets consulting@reninc.com.**



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