Tax Advantaged Planning
For People Who Care

Renaissance
Earning Your Trust Every Day

Social Capital

Social Capital is the portion of your assets you cannot keep for your personal use, but is designated for the use and benefit of society. Unless you choose to use tax advantaged planning options, your social capital will be collected in the form of taxes by the IRS, which will decide how your money is spent.

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Life happens. We're born, we die, and in-between we experience many opportunities to leave a legacy or lend a helping hand in support of the causes dearest to our hearts.

As young parents, child care and services that benefit youngsters may be important. At middle-age, perhaps your children's education and quality of life become a focus. In later years, a search for significance may result in a desire to leave a family legacy that paves a path for your loved ones to follow.

Helping others while maximizing the value of your assets is something we all want. At Renaissance, we can help make that happen.

We are Renaissance...the nation's premier provider of charitable gift design and administration services. Founded in 1987, we provide individuals, through their financial advisors, attorneys, CPAs, and institutional organizations, with the resources necessary to maximize wealth planning strategies and give individuals control over their social capital. Directing your social capital to those things that are important to you provides on-going rewards and fiscal savings.

Advanced Case Design

WE MAKE A LIVING BY WHAT WE GET, WE MAKE A LIFE BY WHAT WE GIVE.

- Sir Winston Churchill

ADVANCED CASE DESIGN

When all is said and done, customer satisfaction hinges on one thing only – achieving the financial rewards expected when implementing the financial plan. For almost 20 years, only one company has been exclusively involved in helping financial professionals and their clients achieve this goal through the design and implementation of charitable plans – and that company is Renaissance!

From our consultants, who are nationally recognized as experts in the industry, to our software which is tried and tested, we are the best at what we do. We support you every step of the way, from conceptual design to implementation. We ask the tough questions that get the tax savings results you expect and achieve unimagined charitable benefits.

Renaissance responds to specific needs by guiding you through:

- Needs Analysis
  Through responses from those involved in the trust decision, we help identify the tax benefits and charitable plan that fits the needs and wishes of all involved parties.
- Marketing Strategies and Materials
  Our library of one page case strategies are excellent tools to convey the benefits of charitable planning and the favorable tax advantages associated with giving. Our unique approach to identifying the important causes in one's life helps assure satisfaction with the overall plan. The expertise gained in implementing over 6,000 plans is behind you every step of the way.
- Case Strategy and Design
  All charitable plans are not alike. All goals are not the same. Expected results differ. Our case design techniques help you achieve the unique tax benefits and financial objectives you desire. We have extensive experience in the use of such demanding assets as real estate, closely held businesses, art, collectibles, and other unique assets.

Second Grade

- State-of-the-Art Illustrations and Proposals
  Customized plans with personalized strategies tailored for specific assets, detailed cash flow projections, and tax benefits are all part of our proposals. After those involved with the trust review the proposal, specific questions can be responded to through enhanced strategies and benefits analyses.

- Technical Expertise
  Tax law changes, state law changes, and the ever changing environment in which we all operate can wreak havoc on the best laid plans IF one is not constantly aware of them. Our skilled professionals not only follow and understand these changes, they testify before the IRS and draft suggested language to assure the continuation of tax advantaged planning.

Legal Support Services

High School

No person has ever been honored for what he received. Honor is our reward when we give.

- Calvin Coolidge

LEGAL SUPPORT SERVICES

Excellence in legal services is the backbone of any charitable plan. The attorney who is responsible for the plan document must understand the intricacies of charitable planning and the nuances associated with even one misplaced or omitted word. The Renaissance legal support team has assisted attorneys nationwide with the design, drafting, and funding of thousands of customized charitable gift instruments. Our experts stay current on all federal legislative and regulatory developments to assist your attorney with total compliance for each wealth management plan.

Custom Document Assistance Service

3,000+ law firms nationwide use the Renaissance Custom Document Assistance Service for its precision, effectiveness, responsiveness, and 18+ years of unchallenged legal status. Our custom document order form, comprehensive fact-finder, and checklist allow us to customize each paragraph of the document to help your legal counsel meet your goals and all legal requirements.

Legal Services Expertise

Tips on document language and structure, review of the intended purpose, and the overall wealth management plan are all part of the Renaissance legal review. Once executed, changing a trust's provisions can be difficult, expensive, time consuming, and, unfortunately, sometimes impossible. That's why we're here. Renaissance's legal services and support, whether it's from inception or only a review of the final document, helps your attorney in determining if the document complies with all applicable laws and meets your needs before it is executed. Read twice, sign once; it's irrevocable!

Administration

HE IS NO FOOL WHO GIVES UP WHAT HE CANNOT KEEP IN ORDER TO GAIN WHAT HE CANNOT LOSE.

- Jim Elliot

Outside Dad's Store

ADMINISTRATION

Four checks and a tax return – we don't think so! Many think that administering a charitable plan is just making sure that distributions are made and tax returns are completed in a timely manner. WRONG! Unfortunately that's what many non-professional administrators do; and as a result we spend many hours working with the Internal Revenue Service (IRS) to undo the wrong that others before us did. Self dealing, step transactions, and disqualifications are only a few of the things that can be unwittingly done by parties to the trust. As experts in our field, our continued review of the trust helps identify circumstances that can challenge the trust's tax exempt status and work with everyone to correct any mis-steps. It's all about being at the top of your game and staying ahead of the things that can wreak havoc.

And, let's not forget four tier accounting. Tracking transactions into all of the appropriate tiers is a must for charitable trusts. Our proprietary software is the best in the business. We know how each of the trust's transactions needs to be allocated in order to calculate proper distributions, pay expenses, and maintain regulatory compliance.

Trust tax returns are as important as individual tax returns. Failure to file timely and/or accurately creates all of the headaches associated with personal tax returns and can result in even more significant penalties. When we have all the needed information by mid-February, tax returns are out the door by mid-March – plenty of time for review, questions, completion of personal tax returns, and timely filing with the IRS.

The trust's annual report provides a concise, visual depiction of the trust's performance. We measure not only this year's activity but also compare it to the past two years' activity. See at a glance the balance in the make-up account, distributions, charitable gifts, investment performance, etc. Bound with the tax returns, the complete package assures access to all the trust activity in one place.

Three Generations

Our staff of skilled professionals has the expertise needed to oversee the administration of these specialized instruments. Combined with our legal services and consulting services, we're always aware of the best way to administer the unique provisions of each trust document while maintaining the highest compliance standards in the industry.

Peace of mind can be bought when Renaissance is your trust's Administrator!

Is Philanthropy Only For The Rich?

Every tax-paying citizen in America is a philanthropist. The question is, are you a voluntary philanthropist or an involuntary philanthropist?

It all begins with sections of the income tax code that allow Americans to deduct the dollars they direct to qualified organizations of their choice – rather than "giving" their money to the Internal Revenue Service.

Taking advantage of these sections of the tax law allows you to give your money to those qualified groups whose missions are important to you. By using powerful financial and charitable estate planning tools, you can become a voluntary philanthropist while achieving your personal financial goals as well.

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