



Disputed Gifts and the Three Fs: Fiduciaries, Family, and Philanthropists

October 6, 2015

Firm Event & Webinar

Live Webinar

-OR-

Gray Plant Mooty

80 South Eighth Street

500 IDS Center

Minneapolis, MN 55402

Sad to say, charitable donees occasionally find themselves in disputes with donors or their families about the use of restricted gifts. This session will explore ways to avoid those disputes and resolve them when they occur.

Disputes can also arise with fiduciaries (personal representatives and trustees) charged with implementing a charitable gift in a donor's estate plan. The gift and the assets that comprise it can be improperly administered and invested. In addition, fiduciaries sometimes behave badly - charging excessive fees, charging an estate or trust for other "services" such as "care services" and, worst of all, actually embezzling from the estate or trust. We will discuss how to be on the alert for these types of problems and what to do when warning signs surface.