RHCC | Rodriguez, Horii, Choi & Cafferata LLP

Reynolds T. Cafferata, Partner

Mr. Cafferata's practice is concentrated in the area of non-profit, tax, estate and trust law.

He has experience advising charitable organizations and high net worth individuals regarding:

Planning complex charitable gifts and charitable trusts.

Creating and operating donor advised funds, private foundations and support organizations.

Creating policies for gift acceptance and risk management, unrelated business income taxes, and self-dealing and intermediate sanctions excises taxes.

Sophisticated estate planning and wealth transfer planning.

Mr. Cafferata also has considerable experience providing corporate fiduciaries guidance in the management of charitable trusts, as well as representing charities and fiduciaries in contested probates and judicial reformation of trusts.

EDUCATION

J.D. University of Southern California, 1992; Order of the Coif

B.A. The George Washington University, 1989; summa cum laude, with honors

HONORS

Daily Journal 2016 Clay Awards Winner, "Attorney of the Year for Extraordinary Achievement in 2015 Appellate Practice"

Los Angeles Lawyer Super Lawyer (2005 to 2010)

Named "Best Lawyer" in Non-Profit/Charities Law, The Best Lawyers In America, published by Woodward White, Inc.

"Los Angeles Best Lawyers Trusts and Estates Lawyer of the Year" (2011)

"AV" rating from Martindale-Hubb

SELECTED PROFESSIONAL AND BUSINESS ACTIVITIES

NCPG Conference Chair

USC Tax Institute Planning Committee

Steering Committee, Leadership Institute of Partnership for Philanthropic Planning

Instructor, Certified Specialist in Planned Giving, California State University at Long Beach

Adjunct Professor, University of Southern California School of Law, Gifts, Wills and Trusts

Fellow, American College of Trust and Estate Counsel

Board Member, National Committee on Planned Giving (2000-2002)

Chair, Exempt Organization Committee, Los Angeles County Bar Association (1995-1996)

COMMUNITY ACTIVITIES

Past Board Member Corporation of Episcopal Diocese of Los Angeles

Chancellor, St. Mark's Church, Altadena

Past Vice Chair, Barnhart School

Former Board of Advisors, American Jewish University Non-Profit MBA Program

Former Board Member, Barlow Hospital Foundation

Former Chair, St. Mark's School Board of Trustees

Past President, Church Charitable Foundation Episcopal Dioceses of Los

Angeles) Past President, Altadena Historical Society

Past President, Friends of the Altadena Library

Former Co-Chair, Save Our Altadena Library campaign

SELECTED PUBLICATIONS

"Should Pledges Be Enforceable? And Other Questions to Ask About Gift Agreements" Journal of Gift Planning (1st Quarter 2007)

"Summary of the Pension Protection Act of 2006" Major Tax Planning (2007)

"Considerations in Selecting Donor Funds, Private Foundations, and Supporting Organizations" CEB, Advising California Nonprofit Corporations (April 2006)

"In Re Helen's Trust: a Tale of How Charities Should and Should Not Respond to Litigation" The Journal of Gift Planning (Volume 9, June 2005)

"IRA Rollover Now!", Exempt Organization Tax Review (September 2004)

"Donor Advised Funds: The Philanthropic Swiss Army Knife" Charitable Gift Planning News (Volume 5, May 2004)

"The Role of Counsel in Foundations: Choices, Beginnings, and Service" Foundation Management (2003)

"Reflections on the Economic Growth and Tax Relief Reconciliation Act of 2001" The Journal of Gift Planning (Volume 5, 2001)

"CRT.com – Structuring a Charitable Remainder Trust for the High Tech Insider" The Journal of Gift Planning (Volume 4, June 2000)

REPRESENTATIVE TRANSACTIONS

Represented charity in $40 million capital gift combining outright gift with charitable lead trust and remainder trust.

Represented donor in $70 million community foundation gift.

Represented individuals in formation of GRATs resulting in more than $2 billion in wealth transfers.

Overall, represented donors and charities in charitable transfers of more than $3 billion.