

## James Tews Earns Chartered Advisor in Philanthropy Designation

02.2018

Koley Jessen Shareholder, James Tews, has earned the Chartered Advisor in Philanthropy (CAP®) designation from the Richard D. Irwin Graduate School of The American College. This unique year-long series provides advanced insight into the process of philanthropic planning and equips professional advisors with the knowledge and tools to help their clients achieve their charitable giving objectives while also helping them meet their estate planning and wealth management goals.

Program candidates are required to pass three graduate level classes. The curriculum addresses the advanced design, implementation and management of charitable gift techniques and strategies, as well as philanthropic tools including charitable trusts, private foundations, supporting organizations, donor-advised funds, pooled income funds and charitable gift annuities. Upon his completion of the program in 2018, James joined Koley Jessen Shareholders, Brandon Hamm and Alex Wolf, as one of 1,300 individuals in the United States to have been awarded the CAP® designation.

As a member of Koley Jessen's Estate and Business Succession Planning Practice Group, James works with families to both develop comprehensive estate plans and to execute the directions set forth in these plans at the appropriate time. General areas of focus include preparing estate plan documents (e.g., Wills, Trusts, Powers of Attorney), both routine and complex probate and trust administration, planning to minimize death taxes, establishing and administering guardianships and conservatorships, Medicaid planning, and,

### ATTORNEYS

James A. Tews

### PRACTICE AREAS

Estate Planning and  
Administration

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when necessary, litigation necessary to accomplish client goals.