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Alana is a partner in the charities team.

She advises both charities and their donors on a wide range of legal, fiscal, and regulatory issues. Her practice focuses on tax-efficient giving by corporate and individual donors, including advising on the structuring of philanthropic giving vehicles, the terms of direct funding, venture philanthropy, social investment and a range of operational matters. Alana was selected by the Society of Trusts and Estates Practitioners as the People's Choice - Trusted Advisor of the Year at the 2019/20 Private Client Awards. She is also recognized as a recommended lawyer in The Legal 500 US 2024 guide in the area of Not-for-Profit Tax.

Alana also focuses on international issues facing both donors and charities, including cross-border giving and fundraising, tax and fiduciary issues connected to overseas operations, UK regulation and recognition of foreign organisations, and the establishment of 'dual qualified' charity structures which enable tax-efficient giving in the US and the UK.

In addition, Alana has experience advising trustees, companies, royal charter bodies, CICs, and associations on a variety of operational matters including: fundraising, sponsorship and trading, constitutional reorganisations, campaigning and elections, and social enterprise.

Track record

German family foundation

Obtaining UK tax recognition for a German family foundation.

Philanthropy offering

Advising a private bank on its philanthropy offering.

Family charities restructuring

Restructuring a group of family charities in light of changing activities and family dynamics.

Cross-border giving

Advising US, European and Australian educational institutions on tax-efficient cross-border giving and study abroad.

Family philanthropic vehicle

Establishing a US-UK dual-qualified family philanthropic vehicle for a UK resident non-domiciliary founding donor.

UK/French charity structuring

Advising a UK philanthropist on the structuring of a UK/French charity to receive valuable French assets tax-efficiently on death.

Family foundation

Advising a family foundation on involving the 'next generation' in the family philanthropy.

Major US museum

Advising a major US museum on the establishment of a UK affiliate.

Family foundation

Comparing jurisdictions for a family foundation for an international family.

Donation acceptance and charitable grant making

Advising UK donor advised funds on donation acceptance and charitable grant making.

Donation return

Assisting a family foundation with the return of a donation.

Philanthropic grant

Assisting Cayman Islands advisers on the English law position of a proposed philanthropic grant.

Philanthropic and social enterprise activities

Advising an entrepreneur on structuring philanthropic and social enterprise activities in connection with a family business.

Philanthropic family

Advising a philanthropic family on the reorganization of their family and business philanthropy.

Arts institution

Assisting a household name arts institution on the release of permanent endowment restrictions.

English charity

Advising an English charity on the application of tax anti-avoidance rules on the provision of donor benefit.

Charitable beneficiaries

Providing tax and fiduciary advice to charitable beneficiaries in relation to the administration of an English estate.

Establishing a not-for-profit entity

Advising an international professional association on its jurisdiction options for establishing an international non-profit organisation.

Talks

- *'Philanthropy Crossing Borders,'* National Association of Charitable Gift Planners Annual Conference (November 2023), speaker
- *'Philanthropy: cross-border giving,'* Transatlantic Estate Planning (September 2023), speaker
- *'Purposeful Giving in International Landscape,'* STEP International Conference in NYC (March 2023), speaker

- '*Cross-Border Co-operation*,' STEP Journal Roundtable (September 2021)
- '*Philanthropy 2021: reset or business as usual?*,' Withers Webinar, chair (April 2021)
- '*International charitable fundraising for US institutions*,' PPGGY Webinar, speaker (February 2021)
- *'The reputational challenges of controversies of association*,' Charity Law Association Annual Conference (October 2020)
- *'Post Exit: Philanthropy on sale of the family business'*, Business Families Spotlight (November 2017)
- *'Next Generation Philanthropy,'* The Philanthropy Programme seminar (September 2017)
- *'Innovative Solutions for Philanthropy,'* Philanthropy Impact and Maverick Collective Roundtable (Chair) - (September 2017)
- *'Practice Note: The Common Reporting Standard,'* Practical Law (August 2017)
- *'Charities & the move to tax transparency,'* Offshore Investment (July 2017)
- *'Legal and Tax Matters for fundraisers,'* CASE Graduate Trainee Scheme training session (June 2017)
- *'Launch your giving journey,'* Charities Aid Foundation and Saunderson House Roundtable (June 2017)
- Charities and Transparency Regimes - Withers Charities Review of the Year (January 2017)
- *'Philanthropy and Anti-terrorist financing regulation,'* STEP Philanthropy Half Day Conference, London (November 2016)
- *'Common Reporting Standard and Charities,'* Charity Law Association Members' meeting , London (November 2016)
- *'Philanthropy roundtable,'* Private Investor: Russia and CIS conference, London (October 2016)
- *'Philanthropy and charitable giving,'* IBC Wealth conference, Cayman Islands (October 2016)
- *'Tax and legal issues for fundraisers,'* CASE Graduate Trainee Scheme (June 2016)
- *'Legal Update - including tax,'* Charity Law Association Annual Conference - (October 2015)
- '*Giving Across Cultures*,' CASE Europe Annual Conference - (September 2015)
- *'Individual and Business Giving in an international context,*' British-Swiss Chamber of Commerce Roundtable - (February 2015)
- *'Structuring International Charities: Theory and Practice*,' Russian Wealth Advisors Forum Zurich - (February 2015)
- *'The role charity can play in the family business*,' Tax & the Family Business - (November 2014)
- *'Family Foundations: Legal and Tax Issues,'* Philanthropy Impact Roundtable - (July 2014)
- *'American Philanthropists in Europe*,' Philanthropy Impact Roundtable - (June 2014)
- '*Giving Across Cultures,'* CASE Europe Annual Conference - (August 2013)
- '*Tax issues for fundraisers*,' CASE Graduate Trainee Scheme - (June 2013)
- '*The 10% inheritance tax rate and maximising your return*', Legacy Labyrinth - (January 2013)
- The Philanthropy Programme - Panel: *'Is the future of philanthropy bright?'* - (November 2012)
- *'Fundraising law update'*, Charity Law Review Conference 2012 - (September 2012)
- *'Philanthropy as a part of Wealth Planning'*, European Association of Philanthropy and Giving (May 2012)
- *'Key Tribunal decisions in 2011'*, Charity Law and Practice Conference 2011 - (December 2011)
- *'Cross border giving: still a challenging area for philanthropists and advisors'*, European Association of Philanthropy and Giving - (October 2011)

External publications

'Returning to territoriality in charitable tax reliefs,' Charity Finance - May 3, 2023, authored
'Comparing Foundation Minimum Distribution in the US, Canada, and the UK,' Withers Insight - February 2, 2022, co-authored
'*Philanthropy 2021 - 'Doing Better At Doing Good'*,' IFC - July 7, 2021, author

'*Trust-based philanthropy and the foundation board*,' Taxation of Exempts - February 12, 2021, author

'*Power and neutrality: An advisor's role in philanthropy and society*,' Philanthropy Impact Magazine - January 26, 2021, author

'*Philanthropy Needs to Rise to the Moment of the Racial Justice Movement*,' Barron's - September 25, 2020, author

'*Where Are The Billionaires Today One Year After Notre Dame?*' Forbes - April 15, 2020, quoted

'Coronavirus and Giving,' WealthManagement.com - April 2, 2020, author

'How Philanthropists Are Helping During the Crisis,' The New York Times - March 27, 2020, quoted

'Charities Fighting Coronavirus Are Left Struggling,' Forbes - March 24, 2020, quoted

'*Coronavirus: Philanthropy and charities*,' Withers Insight - March 16, 2020, author

'*Reputation and the Nonprofit Director: Fiduciary Challenge in the 24-Hour News Era*,' New York Law Journal - March 2, 2020

'Reputation and the Nonprofit Director: Fiduciary Challenge in the 24-Hour News Era,' York Law Journal - March 2, 2020

'*When forever is too long: the rise of spending down in philanthropic foundations*,' STEP Journal - October 2019

'Global Tax Transparency and the Nonprofit Sector,' New York Law Journal - July 25, 2019

'*Making grants overseas: a refresher on HMRC rules for charities*', Charity Tax Group (May 2019)

'Philanthropy in the era of 'Toxic Donations' - expert view,' Spear's - May 29, 2019

'Government Support of Journalism: Canada's New Qualified Donee Meets a UK Review - Parts I and II,' - The Canadian Taxpayer - May 2019

"Incentivising truth and democracy: UK and Canadian developments in public interest journalism" - Alliance (April 2019)

'Complex Gifts and International Giving Vehicles,' CASE International Advancement: North American Strategies for Global Alumni Relations and Fundraising - January 2019

'Charities and Cryptocurrency' - STEP Journal (May 2018)

'Charities and the Criminal Finance Act 2017 - STEP Webinar (March 2018)

'Avoiding Family Philanthropy Pitfalls,' Family Business Magazine - January/February 2018

'Giving solutions for the Multi Family Office' - The International Family Offices Journal (June 2017)

'Charity investment - Integrating Money and Mission', Philanthropy Impact Magazine (April 2017)

'Giving and receiving: Philanthropy and the giving spectrum' - Law Society's PS magazine (December 2016)

International Families and their Philanthropy: Jurisdiction and Structure Choices', Trusts and Estates - 2016

'Foundation investment - Integrating Money and Mission', Philanthropy Impact Magazine - 2016

'Wake-Up Call For UK Charities - The Common Reporting Standard Is Here', Global Tax Weekly - May 2016

'Common Reporting Standard and Charities', Charity Tax Group Annual Conference - April 2016

'International families and their philanthropy: jurisdiction and structure choices', Trusts and Estates - 2016

'Foundation investment - Integrating Money and Mission', Philanthropy Impact Magazine - 2016

'Where can I earn more interest on church savings?', Financial Times - Your Questions - May 2015

'*Philanthropy and the international family*', Offshore Investment - August 2014'*A pivotal moment for Gift Aid*', Finance Focus - October 2013

'*The business of family business giving*', Campden FB - April 2013

'*Dispatches from the Philanthropy Front Line*', Philanthropy Impact - March 2013

'Charities: Implications of FATCA', Governance & Compliance (with Kristin Konschnik) (November 2012)

'Investing in the US', Charity Finance (with Kristin Konschnik) - November 2012

'Anglo-American Philanthropy in a time of fiscal crisis', Offshore Investment (with Richard Cassell) - July 2012

'The Giving White Paper one year on', The Guardian - June 2012

'Technical Briefing - the tax relief cap: a lawyer's view', Charity Finance - April 2012

'Technical Briefing: Proposed reduced rate of Inheritance Tax', Charity Finance - August 2011

'Philanthropy and the Non-Domiciliary', STEP Journal - August 2011

'Philanthropy Review: A call to Action', The Guardian - July 2011

'Giving to the Full', The Lawyer - June 2011

Admissions

State of New York

England and Wales

Education

Cleveland Institute of Music, Bachelor of Music, Master of Music

Cardiff University, Master of Arts

Oxford Institute of Legal Practice, Oxford, UK, Postgraduate Diploma in Legal Practice

University of the West of England, Bristol, UK, Graduate Diploma in Law

Fordham University, Master of Laws (LLM)

Languages

English

Memberships

Non Profit Organizations Committee, NY City Bar Association

National Assciation of University and College Attorneys

STEP Global Philanthropy Advisers Special Interest Group

Executive Committee, Charity Law Association

CLA Standing Committee on Taxation

Steering Committee, STEP Philanthropy Advisors Global SIG

Board of Trustees, Philanthropy Impact

Advisory body, Charity Tax Commission

Charity Tax Group

International Bar Association

STEP Charities SIG

STEP Family business SIG

Key dates

Year joined: 2010

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