

## PROFESSIONAL RESOURCES

### **Some Helpful Documents:**

1. A very thorough and helpful guide is "Creating a Living Legacy (cALL)," available in PDF form from the Joan Mitchell Foundation. Read it and think about where you fit in. The website is: <http://joanmitchellfoundation.org/artist-programs/call>
2. In San Francisco, art consultant Alan Bamberger has a business: Artbusiness.com. His website is [www.artbusiness.com](http://www.artbusiness.com). He has written and posted here many articles for artists at all stages of their careers. Two pertinent articles are: "Estate Planning for Artists. Let Professionals Manage the Art" and "Artist Tips: Checklist for Planning Your Art Estate. Take Charge of Your Legacy as an Artist." (I am sure he would be happy to have you hire him to guide you through the legacy process if you would like his guidance). He also has an article on donating art: "How to Donate Art: A Primer."
3. "Art is Long, Life is Short. Estate Planning for the Artist and the Art Collector" is a "white paper" available in PDF form from [www.venable.com](http://www.venable.com). Very detailed, long and complicated and lots of legalese to read.

### **1) California Lawyers for the Arts**

<https://www.calawyersforthearts.org>

888-775-8995, M-F, 10 – 5; they can get you in touch with a lawyer who specializes in the Arts.

### **2) Alan Bamberger, [www.artbusiness.com](http://www.artbusiness.com)**

Phone: 415.931.7875, Email: [alanbamberger@me.com](mailto:alanbamberger@me.com)

### **3) Scalisi and Bernazzani Financial Services**

1635 Irving St, San Francisco, CA 94122, (415) 664-5884

*(Brandi Bernazzani is a friend of Marc Ellen's who has worked with many "creatives".....she is a pleasant, experienced person)*

### **4) Helena Tiainen Professional Organizer (East Bay location) [Htiainen1@aol.com](mailto:Htiainen1@aol.com)**

### **5) Legacy Specialists (from the Joan Mitchell Foundation):**

David Bratton, Los Angeles, CA, [davidbratton77@gmail.com](mailto:davidbratton77@gmail.com)

Beth Krebs, San Francisco Bay Area, [beth.krebs@gmail.com](mailto:beth.krebs@gmail.com)

### **6) Donating Art**

SCRAP

Local Auction Houses: Bonhams (San Francisco), Michaan's Auction House (Oakland), Clars Auction House (Oakland)

Oakland Museums annual White Elephant Sale (they will pick up)

"The Art Connection" .....this organization accepts artwork from artists and donates them to non-profit and/or social service agencies to put on the walls of their offices.

[Www.theartconnection.org](http://www.theartconnection.org)

## Other books and resources

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### **A visual Artist's Guide to Estate Planning, 1998, by William Keens**

*Dead artists leave two bodies, their own, and a body of work. —Harriet Shorr, Artist*

A guide to estate planning in the USA by Barbara Hoffmann, William Keens and Anne Watson, based on a conference and co-Sponsored by the Marie Walsh Sharpe Art Foundation and The Judith Rothschild Foundation. Has info, checklists and a bunch of links to forms online.

#### **Free copy at:**

[http://www.pittsburghartscouncil.org/storage/documents/visual\\_artists\\_estate\\_plan.pdf](http://www.pittsburghartscouncil.org/storage/documents/visual_artists_estate_plan.pdf)

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### **The Artist Estate: A Handbook for Artists, Executors, and Heirs, By Loretta Wurtenberger, October 2016, on amazon**

Andy Warhol memorably said that “death can really make you look like a star,” but death in itself is not a guarantee of the relevance of an artist. What is of crucial importance is the proper management structure for the posthumous preservation and development of an artist's estate. *The Artist Estate*, a handbook written by Loretta Würtenberger, presents the possible legal frameworks and appropriate financing models available in this situation, as well as the proper handling of interest from the market, museums and academia. Würtenberger's business, **Fine Art Partners** ([www.fineartpartners.com](http://www.fineartpartners.com), Tel. +49-30-60 96 74-30, Fax +49-30-60 96 74-32, [info@fineartpartners.com](mailto:info@fineartpartners.com)), has advised artists and artists' estates for many years. Based on numerous international examples, the author explains the different alternatives for maintaining an artist's estate and makes recommendations on how best to handle work, archives and ephemera following the death of an artist.

#### **They founded The Institute for Artists' Estates**

<http://www.artists-estates.com/en/>

They consult, have a conference, run workshops, they have publications and videos online.

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Recommended for your heirs: lots of interviews with the widows of famous artists.

### **Artists' Estates: Reputations in Trust, August 2005, By Magda Salvesen, on amazon**

*Artists' Estates* offers a fascinating journey into the complex and competitive art world through the distinctive lens of those who deal with the paintings, prints, and sculpture that artists leave behind after their deaths. Bringing together interviews conducted by Magda Salvesen, the widow of the second-generation Abstract Expressionist painter Jon Schueler, this unique book provides a window into the goals and desires, the conflicts and frustrations, and the emotional and financial strains that confront widows, companions, sons, and daughters as the heirs to artists' estates. The judiciously arranged and edited interviews also address the benefits and liabilities of foundations and trusts through the insights of lawyers, gallery dealers, and foundation directors.

Readers will explore well-known estates, including those of Roy Lichtenstein, Mark Rothko, Adolph Gottlieb, Milton Avery, Romare Bearden, and David Smith, as well as the equally intriguing legacies of lesser-known artists whose work came to the fore in the forties and fifties. Together, the passionate testimonies of families and lovers, the measured voices of art

professionals, and the more than eighty photographs offer an indispensable entre into the private and public worlds of art.

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### **The Artists' Legacy, Estate Planning in the Visual Arts**

<https://www.royalacademy.org.uk/the-artist-s-legacy>

Guide to estate planning in the UK by the Royal Academy of the Arts. It contains information about the different aspects of an estate, which might need to be considered when making or updating a will. It includes chapters on cataloguing and storing artworks, an artist's rights and royalties, tax issues and business assets.

I am waiting for more info on this publication.

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### **The Artist As Philanthropist Vol. 1 and Vol. 2 – Findings: Overview Of The Field**, by the Aspen Institute, 2010, [www.Aspeninstitute.org](http://www.Aspeninstitute.org)

AEFI's National Study of Artist-Endowed Foundations is the first effort to define and describe the artist-endowed foundation field in the US. Though a small portion of all private foundations, these distinctively endowed entities are growing in number and as such, represent a potential force shaping cultural philanthropy and stewarding this country's postwar and contemporary art heritage. Little understood in either the private foundation or not-for-profit cultural fields, artist-endowed foundations are worthy of study because of their increasing numbers and growing influence, but also because their distinctive asset mix, and the activities they undertake with respect to their non-financial assets, sets them apart from most other foundations. The Study's initial findings were released in 2010, published in a two-volume Study Report — *The Artist as Philanthropist: Strengthening the Next Generation of Artist-Endowed Foundations*.

**Volume 1 of the Study Report – *Findings: Overview of the Field*** – provides leaders in philanthropy, the arts, education, and journalism with an overview of the artist-endowed foundation field, its origins and development, scale and scope, organizational characteristics and charitable activities, current status, trends, and prospects. It examines the factors influencing the field since its emergence at the turn of the 20th century, including external influences, such as public tax policies, as well as internal influences, particularly artists' demographics and characteristics.

**Volume 2 of the Study Report – *Considerations in Foundation Practice*** – offers artists creating foundations, their advisors, and foundation leaders a summary of considerations in forming, sustaining, and terminating artist-endowed foundations, as well as planning and conducting foundations' charitable programs, encompassing both grantmaking activities as well as a wide variety of direct charitable activities. Briefing papers by scholars in the arts and philanthropy address key issues in foundation practice.

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### **Affair of the Art, Love, Loss and power in the Art world**, By Katrina Strickland, 2013

[https://www.amazon.com/Affairs-Art-Love-Power-World/dp/0522858627/ref=sr\\_1\\_1?s=books&ie=UTF8&qid=1477561304&sr=1-1&keywords=katrina+strickland](https://www.amazon.com/Affairs-Art-Love-Power-World/dp/0522858627/ref=sr_1_1?s=books&ie=UTF8&qid=1477561304&sr=1-1&keywords=katrina+strickland)

A study of the role and responsibilities entrusted to those who tend to an artist's reputation after he or she dies, this work traverses the strange world of art where power resides with those who hold the best stock, and highlights the heart wrenching ways emotion and duty can intersect in the making of decisions by those left behind. Through interviews with those handling the estates of various artists--including Fred Williams, Brett Whiteley, John Brack, Howard Arkley, Bronwyn Oliver, George Baldessin and Albert Tucker--as well as a raft of art dealers, academics, curators, and auctioneers, *Affairs of the Art* shows how the reputation and legacy of artists are curious things and often influenced by factors beyond the quality of work.