



A CHARITABLE TRUST IS IT RIGHT FOR YOU?



What is it? Enjoy initial income tax benefits, shield appreciated assets from capital gains tax, secure a lifetime income stream, and/or preserve assets for an heir – all while supporting the work of your preferred charity.

OPTIONS AVAILABLE THROUGH THE FOUNDATION

Charitable Remainder Annuity Trust

- The Donor:
 - Makes a one-time transfer of assets
 - Receives fixed annual lifetime income of 5% of initial value
 - Income does not fluctuate with changes in market value
- The Charity:
 - Receives assets of trust upon its maturity

Charitable Remainder Unitrust

- The Donor:
 - Transfers assets to trust; additional assets can be added over time
 - Receives annual income of 5% of market value
 - Income fluctuates with changes in market value
- The Charity:
 - Receives assets of trust upon its maturity

Charitable Lead Unitrust

- The Donor:
 - Transfers assets to trust; additional assets can be added over time
- The Charity:
 - Receives annual income of 5% of market value
 - Income fluctuates with changes in market value
- The Donor's Non-Charitable Beneficiary (living heir):
 - Receives assets of trust upon its maturity



Learn more

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