

# Gifts Through Trusts

*Giving a gift through trust must first—and always—stem from your goodwill to help our organization to continue our mission and service.*

## Why Consider a Gift Through Trusts?



### A Simple Way to Provide for Family and Our Organization

Whether you are concerned about outliving your assets in retirement or supplementing your retirement income, you are not alone. Many of our supporters who feel the same way find that a life income plan is an attractive alternative. One such plan, a charitable remainder trust, allows you to benefit a charitable organization such as ours and receive an income stream in return.

With this type of gift, you, or other beneficiaries you choose, receive regular income for life (or for a period of up to 20 years). At the end of the trust term, the balance in the trust supports our mission. Another benefit of a trust is that you may gain freedom from investment management.

You can fund a charitable trust with cash, but you receive several additional benefits by funding your trust with long-term appreciated assets.

## Choices in Gifting Through Trusts

There are two types of trusts that work this way:

**Charitable remainder annuity trusts** and **charitable remainder unitrusts.**

While both trusts allow you to receive an income tax charitable deduction, there are small but significant differences.

### 1 Charitable Remainder Annuity Trust

You receive a regular, fixed-dollar income based on a percentage of the trust's initial assets.  
You may not make additional contributions to the trust.

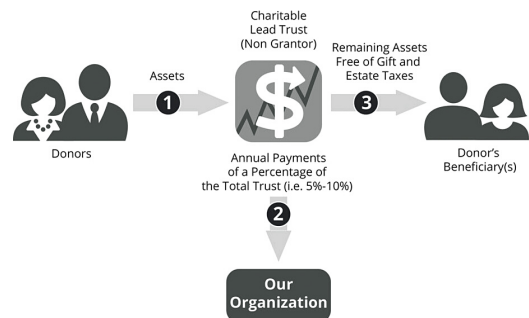
### 2 Charitable Remainder UniTrust

You receive a regular, variable-dollar income (the amount you receive is a set percentage of the current value of the unitrust, redetermined annually)  
You may make additional contributions to the trust.

## Charitable Lead Trusts

Creating a charitable lead trust with us can benefit you and your family in numerous ways. The trust will enable you to make annual gifts to our organization for several years. The remaining trust assets, plus any growth, will pass to your children with little or no gift or estate taxes. Transferring assets to the trust can reduce the value of your taxable estate.

By transferring income-producing assets to the trust, you can reduce your taxable income. See example below:



### Assemble an Expert Team



Your team should include a financial advisor, estate planning attorney, and a gift planning professional, as well as a consultation with your heirs and family members. Contact us by phone or email to ensure the nuances of the transaction are communicated. We would be happy to help you and your advisors as you consider it a gift of real estate to our organization.

## Contact Us

To learn more about how you can make a significant gift to endow the future of our organization through one or more of these plans, please get in touch with us. We would be delighted to talk with you and answer any of your questions.