

Charitable Remainder Trust

Understanding the Benefits



Why a
Charitable
Remainder Trust
may be right for
you



Community
Environmental
Council

Bold Climate Action
Acción Climática Audaz

What is a Charitable Remainder Trust?

A charitable remainder trust (CRT) is a specially designed trust that can provide you, and your family, with income and financial security during life and help you make a charitable gift to support our cause.

Increase your retirement income and financial security.



How can a Charitable Remainder Trust benefit you?

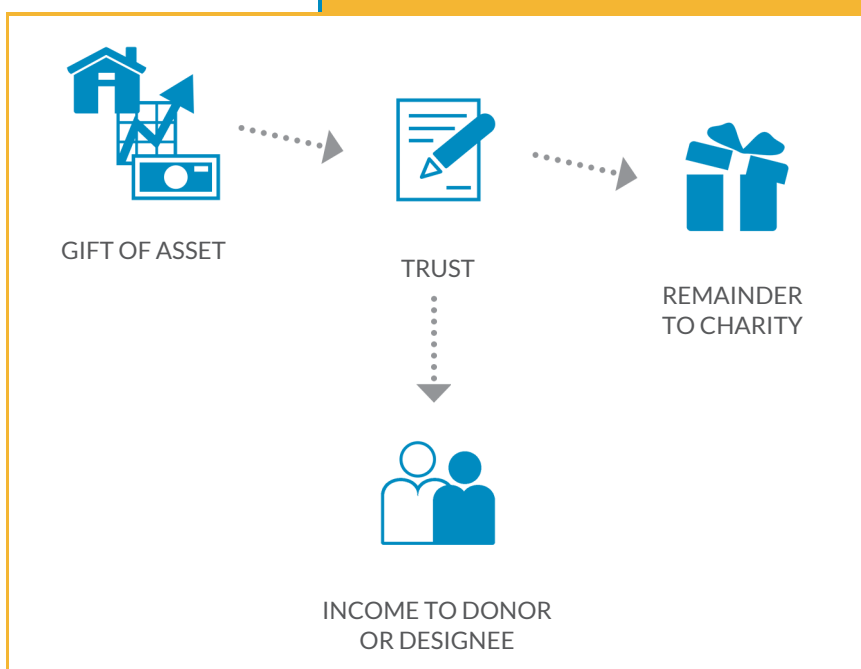
A charitable remainder trust can help you:

- Receive a lifetime of income for you, your spouse and/or your family.
- Increase your retirement income and financial security.
- Make a significant future legacy gift to help continue our work.
- Obtain a substantial income tax deduction this year.
- Support the charitable causes important to you.

Do You Own Highly Appreciated Assets?

If you own highly appreciated assets such as securities, real estate and/or a business, you can benefit by using these assets to fund a charitable remainder trust. The trust will sell your assets tax free, and you can avoid paying capital gains tax on the sale.

How a Charitable Remainder Trust Works



- You transfer appreciated assets or cash to fund a charitable remainder trust.
- If you use appreciated assets, the trust will then sell these assets tax free.
- The trust will invest the assets and pay income to you and/or your selected beneficiaries.
- You will receive a charitable income tax deduction in the year you transfer assets to the trust.
- Our organization benefits from the remaining trust assets after all payments have been made.

Definitions

Appreciated Assets

Assets that have increased in value while you have owned them.

Tax-Free Sale

Because a charitable remainder trust is tax-exempt, it can sell the assets you transfer without any tax due.

Remainder Beneficiary

The charitable beneficiary you select to receive the remaining trust assets after all payments have been made to you and/or your loved ones.

Check with your attorney or tax advisor about the benefits and consequences of funding a charitable remainder trust.



Let Us Help You

We would be happy to work with you and your advisor to design a charitable remainder trust that best meets your goals. If you would like to start the process or have any questions, please contact us.

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