

INSERT: CHARITABLE REMAINDER TRUST

Front panel

For photocopying or to finish, trim just inside of dotted line.

Preview

*Do you have something
you can
TRUST?*



Safe (def. 5)

We do, and
here it is ...

Inside panel

Add your own information. Reformat as necessary.
Trim to match front panel.

A Charitable Remainder Trust
can benefit **YOU** when you make a gift to **US**.

When you contribute cash, securities or real estate to a charitable remainder trust...

- The trust property is *invested and managed by professionals*.
- You (and/or others you designate) receive the *net income* for *life or a term of years*.
- You receive a *current tax credit* and may *avoid tax* on a portion of any capital gain.
- The trust property is *removed from your probate estate*, assuring privacy and reducing probate cost.

When the trust terminates, the remaining balance is given to

[Name of Charity]

To learn more, phone us at [phone number].

Preview

the contact person]

[Name of Charity]

[Address]

[Telephone]

I'd like more information about:

- A charitable remainder trust
- Other ways of giving to [Charity]

Name(s) _____

Address _____

City, province, postal code _____

Telephone _____