

Charitable Remainder Trust

CHARITABLE REMAINDER TRUST

Turn Your Donation in to a Steady Cash Flow

BENEFITS
• You receive a fixed income for life
• You get an income tax charitable deduction
• You avoid immediate capital gains tax.
• You have the potential to increase income from current investments
• You may choose to free yourself from further investment responsibilities

A **charitable remainder trust** will provide a fixed payment to you and/or your loved ones for life for a specific number of years. The size of the payment is determined at the time the gift is made. Donors seeking a higher payout will receive a lower current tax deduction and vice versa.

You determine at the outset the amount you wish to receive from your donation, and if you wish, your spouse or other loved ones can receive the same income after your lifetime. Ultimately, the 'charitable remainder' or remaining balance in the trust, after the lifetimes of those you choose, will be distributed to your chosen charity.

Note: The techniques and strategies above are intended to provide accurate information regarding the subjects covered; however, they are furnished with the understanding that PEAFF is not engaged in rendering legal, accounting, or other professional advice or counsel. The foundation encourages the reader to seek competent professional counsel to address any legal or other issues that may arise.