

A Charitable Legacy



If you would like to give to a cause or organization you hold dear, donating to a Charitable Lead Trust (CLT) or Charitable Remainder Trust (CRT) might be something to consider. Each of these gifting strategies offer an array of unique benefits such as lifetime income, maintaining control of assets donated, legacy protection, and favorable tax status. In addition, Charitable Trusts are irrevocable, so assets placed in them will be excluded from your estate.

Which gifting strategy is right for you?

Charitable Lead Trust (CLT)

This Irrevocable trust allows the named charity to receive an income stream for a set period of time. Through this process, the donor is able to receive a federal income tax deduction on the amount that was gifted to the trust. At the end of the stated term, the remaining assets within the trust are distributed to the donor and/or named beneficiaries.

Charitable Remainder Trust (CRT)

This type of gifting provides a federal income tax deduction for the donor while also allowing the donor and/or beneficiaries of the trust to receive a lifetime income stream from the gifted assets. Upon the death of the donor and named beneficiaries, any remaining assets within the trust are transferred to the named charity.

Give a gift that will brighten someone's tomorrow

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