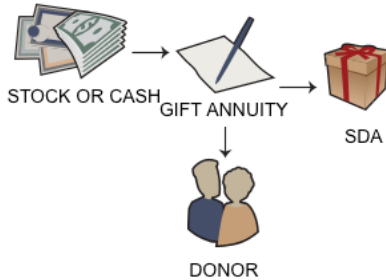

CHARITABLE REMAINDER UNITRUST

You may be concerned about the high cost of capital gains tax with the sale of an appreciated asset. Perhaps you recently sold property and are looking for a way to save on taxes this year and plan for retirement. A charitable remainder unitrust might offer the solutions you need!



BENEFITS OF A CHARITABLE REMAINDER UNITRUST

- Receive income for life, for a term of up to 20 years or life plus a term of up to 20 years
- Avoid capital gains on the sale of your appreciated assets
- Receive an immediate charitable income tax deduction for the charitable portion of the trust
- Establish a future legacy gift to our organization

HOW A CHARITABLE REMAINDER UNITRUST WORKS

- 1- You transfer cash or assets to fund a charitable remainder unitrust.
- 2- In the case of a trust funded with appreciated assets, the trust will then sell the assets tax-free.
- 3- The trust is invested to pay income to you or any other trust beneficiaries you select based on a life, lives, a term of up to 20 years or a life plus a term of up to 20 years.
- 4- You receive an income tax deduction in the year you transfer assets to the trust.
- 5- Our organization benefits from what remains in the trust after all the trust payments have been made.

CONTACT US

If you have any questions about charitable remainder unitrust, please contact us. We would be happy to assist you and answer your questions.

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