



GIFTING WITH CHARITABLE REMAINDER TRUSTS

With a charitable remainder trust, you can receive income each year for the rest of your life from assets you give to the trust you create. Your income can be either variable or a fixed amount. After your lifetime, the balance in the trust goes to the charities of your choice.

Your Possible Benefits

- A partial charitable income tax deduction
- Potential for increased income
- Up-front capital gains tax avoidance
- Professional management of trust assets available

Choose Between Two Main Types

There are two types of charitable remainder trusts:

- The annuity trust pays you, each year, the same dollar amount you choose at the start. Your payments stay the same, regardless of fluctuations in trust investments.
- The annuity trust pays you, each year, a variable amount based on a fixed percentage of the fair market value of the trust assets. The amount of your payments is redetermined annually. If the value of the trust increases, so do your payments. If the value decreases, however, so will your payments.



To discuss gifting opportunities, please contact:

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