

You want to leave as much as you can to your family



Even if you wait until the future to make a gift to your children, every gift has a cost. How can you make gifts to your family without paying excessive tax?

When you think about transferring a specific block of stock, real estate or other property to your family during your lifetime, you may be concerned about the potential gift tax due. If you have a taxable estate, you may also be concerned about future estate tax. You need to find a way to make gifts to your family both now and in the future without paying substantial tax.

If you identify with any of these situations, the solution is a family lead trust. A family lead trust can help you achieve your goals of passing on property to your family while reducing or even eliminating gift or estate taxes.

How Can We Help?

- ☐ I want to know more ways to increase my giving and save money for my family and myself.
- ☐ I have already included your organization in my will or trust.
- ☐ Please send me your FREE estate planning guide.

The best way to contact me is by:

☐ Email ☐ Mail ☐ Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

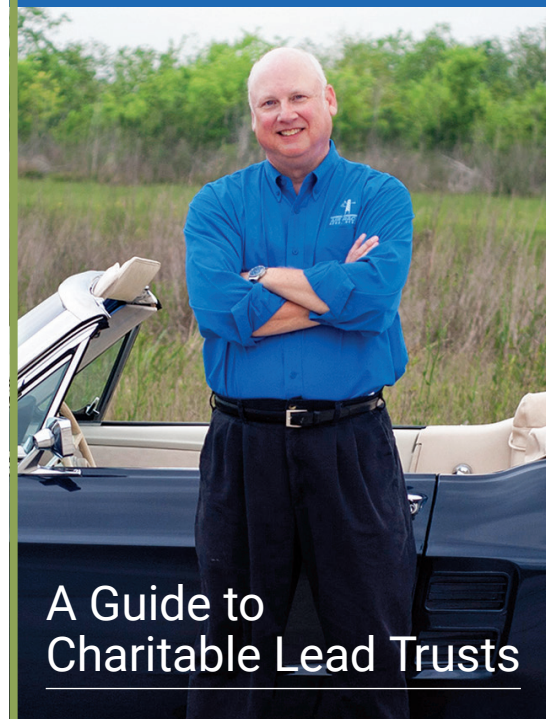
(All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



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Multiplying Gifts to Family



A Guide to Charitable Lead Trusts

Luke and Cynthia help their family through giving

Luke and Cynthia spent many years volunteering and supporting their favorite charity. They wanted to give back in a way that would help fulfill its mission. They heard that they could fund the charitable lead trust with cash or stock and the trust would pay income to our organization for a number of years with the rest of the trust value going to their children in the future.

Luke and Cynthia liked the fact that their children would be well cared for and that they could see the result now of their gifts to their favorite charity. They were also pleased to learn that taxes on the gift to their children would be significantly reduced by the added benefit of a gift tax charitable deduction. After the income was paid to our organization, the remaining trust value would go to their family with very little tax owed.



Create a Family Lead Trust

There are several ways to create a **family lead trust** to meet your needs. Below are two plans (one for during your life and one for your estate) that will permit you to give your family stock, real estate or other appreciated assets and lessen the burden of gift or estate tax. In addition, a family lead trust will provide a stream of income for our charitable organization, enabling you to share in its good work far into the future.

Living Family Lead Trust



Rather than making a current gift to your family at a high gift tax cost, why not transfer your property to fund a family lead trust? The Trust will pay fixed income to our organization for a period of time and then the property will go to your family at a substantial savings. The benefit of this plan is that it provides a charitable gift tax deduction that will reduce or even eliminate the cost of making the gift to your family. Better yet, you can select the appropriate term of years for the Trust, enabling you to schedule when the principal will pass to your family.

You will have the satisfaction of knowing that you helped our organization, made a significant gift to your family and received excellent tax benefits.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

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Testamentary Lead Trust

Another way to make a future gift to family is through a **testamentary lead trust**. A testamentary lead trust is simply a Trust funded at your death. It pays income to our organization for a period of time, after which the Trust assets go to your family. The benefit of the testamentary lead trust is that it provides you with a charitable estate tax deduction, reducing your estate transfer tax. This plan works especially well for scheduling inheritance for children and grandchildren to begin at an age of financial responsibility. Your estate and your family will benefit from this plan!

