

Additionally, the donor receives a charitable deduction. Certain types of charitable trusts also allow the donor to make additional gifts to the trust, increasing the donor's income and providing another charitable deduction. The funding assets are also then removed from the donor's estate.

The Episcopal Church Foundation can assist donors in discussing their options for funding a charitable remainder trust as well as serve as trustee for the trust if the donor wishes. Additionally, the Foundation provides, free of charge, legal help to draft documents for the trust agreement. For further information, please contact the Episcopal Church Foundation.

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**For the free booklet, *Charitable Remainder Trusts*, please complete this form and return it to the church office or contact (planned giving committee member) or the Episcopal Church Foundation, 800-697-2858 or [www.episcopalfoundation.org](http://www.episcopalfoundation.org).**

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_

E-MAIL \_\_\_\_\_

## ENTRUST A LASTING LEGACY TO YOUR PARISH WITH A CHARITABLE REMAINDER TRUST



**H**ave you considered making a larger charitable gift to support your parish, but have concerns about personal and family financial security? A charitable remainder trust can assist you in making a meaningful gift to your church while satisfying other significant financial concerns. You can protect your own financial security, and that of your loved ones, and still create a lasting legacy for your parish.

A charitable remainder trust is an irrevocable gift that provides payments to the donor for as long as he or she survives. This type of trust can be funded with highly appreciated assets and could allow the donor to avoid significant capital gains taxes. The income from a trust is often much higher than the income from the assets had been.

