

Charitable Remainder Trust

Permits you to make a gift of your appreciated property and receive payments for a life, two lives or a term of years.

THE NEED

A way to bypass capital gains tax on appreciated property or stock, while providing regular income for life; or a way to reduce tax liability after the sale of appreciated assets

THE SOLUTION

A Charitable Remainder Trust can:

- Sell your home tax-free
- Provide you with regular income for life
- Bypass capital gains tax
- Provides a current charitable tax deduction

THE BENEFITS

By establishing a CRT, you can bypass capital gains tax. The CRT sells your property tax-free and then reinvests in assets that produce increased income for you and your loved ones. Best of all, you will receive a current charitable deduction for your gift of the remaining value in the Trust that will go to Coyote Hill.

THE DONOR

Donors with a need to sell their appreciated stock or real estate, or those downsizing from a larger home to a smaller one and wanting to avoid capital gains, while generating consistent income for the future.

WHAT IS A CHARITABLE REMAINDER TRUST?

A **Charitable Remainder Trust (CRT)** permits you to make a gift of your appreciated property and receive payments for a life, two lives or a term of years. By establishing a CRT, you can bypass capital gains tax. The Trust will sell your property tax-free and then reinvest in assets that produce increased income for you and your loved ones. Best of all, you will receive a current charitable deduction for your gift of the remaining value in the Trust that will go to Coyote Hill.

Two Examples of the Benefits of a CRT

Fixed Annuity - Nina's Story

Nina is a surviving spouse who wanted to move out of the family home and purchase a smaller, more manageable property. Nina learned that she could make a gift of her home to establish a Charitable Remainder Trust and receive income for life. Nina liked the fact that the Trust would sell her home tax-free. She was excited that she would have enough income to make the monthly payments on a condominium and receive a charitable deduction for her gift.

Bypass Capital Gains - The McQueen's Story

The McQueens were preparing for retirement. Over the years, their stock portfolio had grown in value. With retirement on the horizon, the McQueens were looking for a way to sell their highly appreciated stock, generate income for the future and avoid paying high capital gains tax. The McQueens learned that they could transfer their stock to a Charitable Remainder Trust and

bypass capital gains tax. The Trust would sell the stock tax-free, providing them with income for retirement. The McQueen's made the gift and received a charitable deduction and substantial tax savings.

Please note: The story examples are not actual donors to Coyote Hill. Since your Trust benefits under federal rules may be different from the examples, please contact us for your specific benefits.

