

CHARITABLE REMAINDER TRUSTS

GIVING BACK TO YOUR COMMUNITY & THE CAUSES YOU CARE ABOUT MOST

What Is a Charitable Remainder Trust?

- A donor transfers cash or equities irrevocably to a trust.
- When no longer needed by the donor, the remainder goes to a fund at the Community Foundation, as designated by the donor.
- This is a good opportunity for a donor to make a gift of assets that have increased in value. By funding the trust, the donor can receive income and mitigate capital gains tax.

Fundamental Types of Charitable Remainder Trusts

- CRAT: Charitable Remainder Annuity Trust
- CRUT: Charitable Remainder Unitrust

To learn more about

**Charitable Remainder
Trusts, contact:**

Jason Arbacheski, CAP
Gift Planning & Stewardship
Director
jason@chescofcf.org
(610) 696-2628

Beth Harper Briglia, CPA, CAP
Senior Philanthropic Advisor, Of
counsel
beth@chescofcf.org
(610) 696-8045

