

Charitable Lead Trust



Support Our
Cause and Provide
for Your
Children's Future

Mount 
Saint Mary's
University
LOS ANGELES

100
UNSTOPPABLE
YEARS

Would you like to support the work of the causes that matter most to you while also ensuring that your children are well provided for after you are gone? Consider using a charitable lead trust (CLT) to achieve your personal, family and philanthropic goals.

How Can a Charitable Lead Trust Benefit You?

Creating a charitable lead trust with us can benefit you and your family in numerous ways:

- The trust will enable you to make annual gifts to our organization for a number of years.
- The remaining trust assets, plus any growth, will pass to your children with little or no gift or estate taxes.
- Transferring assets to the trust can reduce the value of your taxable estate.
- By transferring income-producing assets to the trust, you can reduce your taxable income.



How Does a Charitable Lead Trust Work?

- We can provide resources that will help you and your attorney create a trust that meets your goals.
- You transfer cash or income-producing assets to the trust.
- The trust will pay income to us based on the number of years you select.
- At the end of the trust's term, the balance of the trust's principal plus any appreciation will be transferred to your family.

"We thought this strategy was a winner! The prospect of helping our children in the future while providing for our favorite charitable cause now made us pleased with our decision."

What Assets Can Be Used to Fund the Trust?

The best assets are those with the potential for appreciation. Any growth in the trust assets will be passed on to your children with little or no gift tax.

Other Ways You Can Use a Charitable Lead Trust

- **Testamentary** - Some people prefer to fund the trust through their estate plans at their passing. Doing so will provide your estate with a charitable estate tax deduction.
- **Underage or Spendthrift Heirs** - If you have heirs who have not displayed the ability to appropriately manage their finances or who are underage, a charitable lead trust is a way to delay their inheritance to a future point in time.

Is a Charitable Lead Trust Right for You?

If you are looking for a way to pass on some of your assets with little or no tax and see the impact of your gifts today, then a charitable lead trust is an excellent option worth considering.

Definitions

Charitable Lead Trust

A trust that is funded by a charitable donation and which pays income to charity for a number of years, after which the remaining trust assets go back to the donor or to family. The trust produces a number of tax benefits during the time payments are made to charity.



May We Help You?

If you have any questions about charitable lead trusts, please contact us. We would be delighted to talk with you and answer any questions that you have regarding how this trust can benefit you, your family and our work.

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