

# Gifts Through Trusts



Jewish Foundation  
OF GREATER NEW HAVEN

Create a lasting impact while supporting your financial goals. With trusts and annuities, you can generate income, receive tax benefits, and support the causes you care about.

## CHARITABLE REMAINDER TRUSTS

Receive income for life or for a set period, while making a meaningful future gift to charity. At the end of the trust term, the remaining assets support the organizations you choose.

### Provides income and tax benefits

#### This may be right if you:

- Want reliable income from your assets
- Have appreciated assets to contribute
- Want to support charity while planning for the future

#### Two common options:

- Fixed annual payments that stay the same each year
- Variable payments that adjust based on the value of the trust

## CHARITABLE GIFT ANNUITIES

Make a gift and receive fixed payments for life. Payment rates are based on age, with higher rates for older donors.

### A simple way to receive lifetime income

#### This may be right if you:

- Want predictable, fixed payments
- Prefer a straightforward giving option
- Would benefit from an immediate charitable tax deduction

*Based on current federal rates. Individual results will vary.  
Please consult your professional advisor regarding your personal circumstances.*

# Gifts Through Trusts

## CHARITABLE LEAD TRUSTS

Support charity now while preserving assets for your family later. The trust makes payments to charity for a set period, after which the remaining assets pass to your beneficiaries.

### Make an impact today, benefit your family tomorrow

#### This may be right if you:

- Want to give now while planning for future inheritance
- Are focused on long-term wealth transfer
- Want to support multiple charitable organizations over time

#### Two common options:

- Fixed annual payments to charity
- Variable payments based on trust value

## HOW IT WORKS

Rachel, 75, creates a charitable remainder unitrust with \$500,000.

- Receives \$25,000 in the first year
- Payments adjust annually based on trust value
- Receives a charitable tax deduction of \$290,360
- At her passing, the remaining assets support charity

*Results will vary based on individual circumstances.*

## AT A GLANCE



### Charitable Remainder Trust

Provides income now and a charitable gift later



### Charitable Gift Annuity

Provides fixed income for life



### Charitable Lead Trust

Supports charity now and passes assets to family later

