



SAN DIEGO ZOO GLOBAL
**LEGACY
GIVING**

CHARITABLE REMAINDER TRUST

AVOID CAPITAL GAINS WITH A CHARITABLE REMAINDER TRUST

Are you looking for a way to avoid capital gains tax on the sale of your appreciated stock or real estate? You may want to consider transferring your property to fund a charitable remainder trust (CRT). The trust will sell your assets tax-free, which can provide significant tax savings to you.



BENEFITS OF A CHARITABLE REMAINDER TRUST

The charitable remainder trust (CRT) has a number of significant benefits, including bypassing capital gains tax. The trust pays income to you or you and your spouse for life, or a term of up to 20 years, and you benefit from a charitable tax deduction at the time of your gift. After you pass away, we receive the remaining trust assets to help further our mission.

WAYS TO RECEIVE CHARITABLE TRUST INCOME

There are two charitable trust payout options to consider. Most charitable remainder trusts pay income based on the trust value. This type of trust, called a charitable remainder unitrust, may pay you increased income over time with growth in the trust. The other type of trust, a charitable remainder annuity trust, makes a fixed payment to you based on the value of your gift.

OPTIONS FOR CASH AND INCOME

It is possible for you to receive some cash up front from the sale of your property and also lifetime income from a unitrust. This sale and unitrust option is created when you contribute a portion of your property to fund the trust. Once the property is sold, the proceeds are then divided between the trust and you. While you may owe tax on the cash you receive, the charitable deduction from your unitrust may partially or even completely offset these taxes.

To learn more about the benefits of creating a charitable remainder trust or to view a charitable remainder trust illustration, visit our website at zoolegacy.org or call us today at **619-557-3947**.