Typical Donor Profile

A Charitable Lead Trust could be right for you if:

- You have appreciating assets that you want to pass on to the next generation.
- You want to reduce your gift and estate taxes.
- You want to make a significant gift and maximize the value of your legacy.
The Charitable Lead Trust

Do you expect to be hit with gift and estate tax? Has your attorney recommended that you fund a trust? Do you believe in our cause but don’t want to make a gift that “disinherits” your children or grandchildren?

If so, then please consider the Charitable Lead Trust.

Imagine...

You may greatly reduce or completely avoid gift and estate tax on assets that you pass on to your family. Simply place them in a trust and direct a portion of the trust income to go to support our mission over a period of years.

The trust makes payments to our organization first, and then returns the remaining assets to you, your family, or others you designate at the end of the term.

There are several types of lead trusts. But rather than send you to law school, we invite you to contact us for a friendly phone conversation to discuss which lead trust would work best for you.

Thank you for your interest in supporting our future.

How It Works

■ You contribute securities or other appreciating assets to a Charitable Lead Trust. Our minimum requirement for this gift plan is $1,000,000.

■ The trust makes annual payments to Miramor Institute for a period of time.

■ When the trust terminates, the remaining principal is paid to your heirs.

Benefits

■ Income payments to us for a term reduce the ultimate tax cost of transferring an asset to your heirs.

■ The amount and term of the payments to Miramor can be set so as to reduce or even eliminate transfer taxes due when the principal reverts to your heirs.

■ All appreciation that takes place in the trust goes tax-free to the individuals named in your trust.