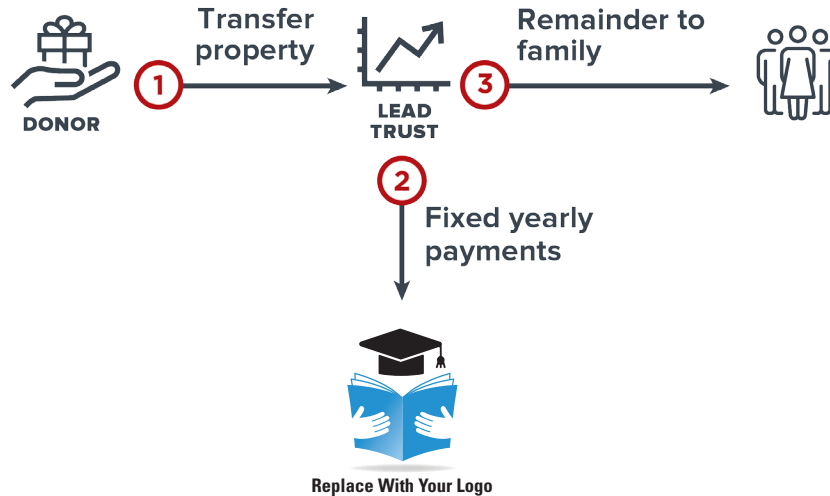


# CHARITABLE LEAD TRUST

*A gift that allows you to transfer wealth with significant tax advantages.*



## *How It Works*

- You contribute securities or other appreciating assets to a Charitable Lead Trust. Our suggested minimum gift is \$1,000,000.
- The trust makes annual payments to {Our Organization} for a period of time to fund a program that you are passionate about supporting.
- When the trust terminates, the remaining assets and any appreciated value 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 {Our Organization} can be set so as to reduce or even eliminate transfer taxes due when the assets revert to your heirs.
- You may designate whether gains in the value of the trust increase payments to {Our Organization} or may be added to the assets in the trust.

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*For more detailed information, please contact us so that we can assist you through every step of the process.*

### **John Doe**

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