

## WE CAN HELP

I have reviewed this brochure and:

- I would like to talk to someone about charitable remainder trusts.
- I would like to receive information about other charitable tax-planning options.
- I would like to sign up for your free e-newsletter.

The best way to contact me is:

- Email  Mail  Telephone

Name \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_

State/Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

(All inquiries are treated with complete confidentiality.)

Please complete this form and either send to **lfink@akroncf.org** or mail to:

Akron Community Foundation  
Attn: Laura Fink  
345 W. Cedar St.  
Akron, OH 44307

## WHY AKRON COMMUNITY FOUNDATION

At Akron Community Foundation, our business is helping you give efficiently, effectively and meaningfully to your favorite causes and charities. You choose the cause or nonprofit. We make sure your charitable gifts reach your targets, whatever they are. By establishing a fund at Akron Community Foundation, you and your family can support activities right here in greater Akron, or at any 501(c)(3) nonprofit in the nation.

With six structured charitable fund options — from popular donor-advised funds to scholarship funds — you can give in the way that makes sense for your charitable dreams. Do you want to give to specific organizations? You can do that. Do you want your family to be involved in the grant-making decisions? We can make that possible, too.

Let us help you establish your charitable legacy in a way that makes the most sense for you and your loved ones. Call your professional advisor today to discuss your options. Or, you can contact us directly at 330-376-8522 or [www.akroncf.org](http://www.akroncf.org).



## CHARITABLE REMAINDER TRUSTS



The sum of objectives realized.



Enriching lives since 1955

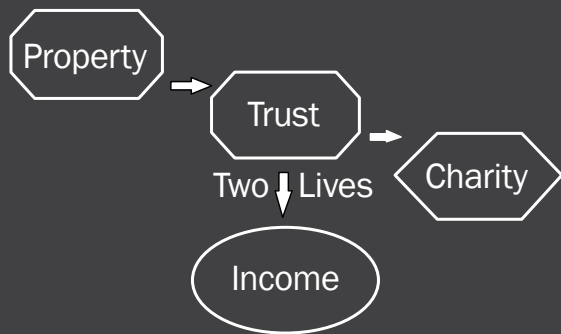
## ▶ WHAT YOU LEARNED IN MATH CLASS

During those school days of long ago, most of us learned that subtraction would result in a remainder, while addition would create a sum.

It turns out that our trusted math teachers must not have known about a planning tool that not only adds to the benefits your family receives from certain assets, but actually multiplies the impact of assets in the future.

Since the late 1960s, families and individuals have been utilizing charitable remainder trusts (CRT) to make particular types of assets (especially highly appreciated, low-yield assets) have an impact far beyond what you learned in math class.

### CHARITABLE TRUST



This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

## ▶ HOW A CRT WORKS

You may transfer cash or an asset into a charitable remainder trust. You will avoid capital gains tax and receive a charitable income tax deduction.

These tax benefits are possible because you are making a gift of the trust remainder to the community foundation. Your benefits begin to add up!

The trust makes regularly scheduled payments to you, which may increase your income.

## ▶ THE BASICS OF A CHARITABLE REMAINDER TRUST

### How a charitable remainder trust benefits you

Consider a \$200,000 asset that had been producing 2 percent income (\$4,000 each year). Thanks to the CRT, the full \$200,000 is invested to generate a higher return, perhaps providing a 6 percent income stream or \$12,000 annually.

For a husband and wife, both 65 years of age with a 25-year life expectancy, this adds up to an increase in income of more than \$200,000 over their lifetimes (an increase of \$8,000 x 25 years).

The remaining value in the trust will go to help the causes the donors specify upon the death of both the husband and wife. Assuming wise management of the trust principal over the years, this remainder can easily exceed the original value of the trust. When added up, the charitable remainder trust can save current taxes, generate an increase in income and result in a substantial charitable fund in your name.

For more information about how a charitable remainder trust might multiply your income and help you realize the sum of your objectives for family and for charity, we invite you to complete the reply form and return it to our office or visit our website at [www.myakronlegacy.org](http://www.myakronlegacy.org).

