

Charitable
**REMAINDER
TRUST**



**ST. ANDREW
PERMANENT
ENDOWMENT**



**Your Gifts.
Forever Invested.**

St. Andrew Permanent Endowment

5801 W. Plano Parkway | Plano, Texas 75093
972.380.8001 | standrewumc.org/endowment

CHARITABLE REMAINDER TRUST

CHOICES

- **Annuity Trust** | Predictable income of at least 5% of the original amount of the trust. Additional contributions not permitted. Or
- **Unitrust** | Variable income of at least 5% of the trust's assets valued annually. It may be possible to make additional contributions to the trust.

BENEFITS FOR YOU

- **Income** | Payments distributed to you or others whom you designate for life or a fixed period.
- **Tax Deduction** | You may be eligible for a tax deduction the year the trust is established.
- **Capital Gains** | You may avoid up front capital gains tax.
- **Estate Tax** | Trust assets are not a part of the estate.

YOUR GIFT

- **Outstanding Support** | After the lifetime(s) of the income beneficiary(ies), the charitable remainder of the trust is distributed as your generous gift.

NEXT STEPS

- Establish your Charitable Remainder Unitrust or Annuity Trust and choose your Trustee.
- Transfer your highly appreciated assets or real estate into the trust.
- The trust sells the assets without creating a taxable event and reinvests in securities appropriate for the trust's goals.

Thank you for considering this gift!

Please consult with your professional advisers on how this gift would fit into your plans.

If you have questions, please contact the church business office: 214.291.8012.