



THE CATHOLIC  
FOUNDATION

## CHARITABLE TRUSTS

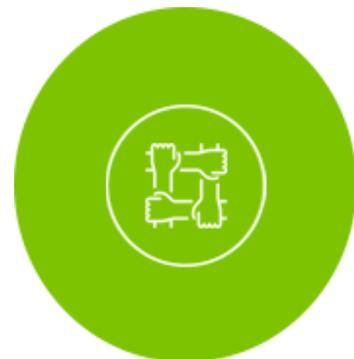
### A Stronger Future

A Charitable Trust is a wonderful example of a gift that can benefit both the Church and you or your family members. There are different types of charitable trusts, which make them a flexible charitable giving option. It is this flexibility that makes it so attractive to a wide variety of donors. It is worth noting that a Charitable Trust is different than a Personal Trust that you might have drafted by a lawyer. The two types of charitable trusts that exist are Charitable Remainder Trust and the Charitable Lead Trust.



#### Charitable Remainder Trust

A Charitable Remainder Trust (CRT) allows you to donate cash, marketable securities or other assets to The Catholic Foundation, and in return you receive regularly scheduled payments for life or for a pre-determined number of years. At the end of the term, the organization that you designate receives the remaining assets.



#### Key benefits

- Allows fixed or variable payments for life or a term of years for you or others
- Reduce estate and gift taxes
- Receive an immediate tax deduction based on the present value of the charity's future interest
- \$100,000 minimum



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“

At the end of **our life**, we shall all be judged by **charity**.

– St. John of the Cross

”



### Charitable Lead Trust

A Charitable Lead Trust (CLT) provides fixed income payments to your selected charitable organization for a specified number of years. *At the end of the term, the remaining balance in the trust is transferred back to you or your heirs.*



### Key benefits

- Allows you to make an ongoing gift to charity, while retaining a future interest in the asset
- Ability to pass assets on to heirs at a substantially discounted value
- Receive a current-year tax deduction for the present value of the amount the charity will receive
- \$100,000 minimum



Let's talk

#### About Us

The Catholic Foundation's mission is to inspire giving and assist donors to provide for the long-term needs of the 23-county Diocese of Columbus. The Catholic Foundation is one of the oldest and largest Catholic foundations in the country, distributing nearly \$150 million throughout the diocese since 1985.

#### Why Us

The Catholic Foundation offers a way to leave a legacy uniquely aligned with Catholic values and beliefs. Additionally, the Foundation invests all funds in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.

