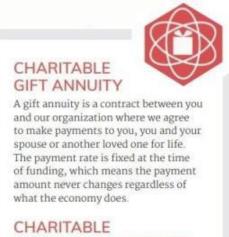


Wednesday, March 9, 2022

One of the greatest joys of charitable estate planning is learning all of the ways you can benefit yourself and your family while also providing for the causes important to you. Many people are simply unaware of charitable strategies such as the Charitable Gift Annuity and Charitable Remainder Unitrust that can create new income streams for you and your loved ones.

Both the gift annuity and unitrust feature:

- An income tax deduction at the time your gift is made.
- · Capital gains tax avoidance when you make a gift of appreciated assets.
- · Flexibility in who you want to benefit and for how long.



REMAINDER UNITRUST

A unitrust is a special charitable trust set up to pay you and/or your beneficiaries income for life or a number of years. It offers you more flexibility in the assets used and invested, and how the payments (distributions) are made.

For more information and our step-by-step estate planning guide please give us a call at 718-965-7375 x1616 or reply to this e-mail. To help ensure your will and estate plan reflects your desires, you may also view some helpful videos on our planned giving website –www.cfbqlegacy.org.

This information is educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.



Endowments



How to Give



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It's never too late to plan for the people and causes you care about. Our easy-to-use estate planning guide can help you gather the information you need before meeting with your attorney.

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PLANNED GIVING CALCULATORS

Use our online calculator to view the tax and income benefits of making a gift to support our cause. This can help you determine the best plan to meet your needs and goals.

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