



Wednesday, March 3, 2023

While a gift annuity is attractive in its simplicity, you may want more benefits and control. A charitable remainder unitrust offers a bouquet of benefits. It can handle more complex assets and give you more control, including over your income stream.

If you want more control or have more complex goals, a charitable remainder unitrust (CRUT) may be right for you. A CRUT can:



Accept and handle difficult assets such as investment land or rental property



Provide better control than a gift annuity



Offer similar tax benefits

A CRUT gives you more control over the payment rate, payment schedule and allow more complex assets to be handled.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375](tel: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.

Theme of the Month: Why Planned Giving? Making a planned gift is a win-win for you the donor and your favorite non-profit(s). You have the opportunity to leave significant amounts to your favorite causes and give your heirs a tax break. Planned giving provides more power over how your gift is used by adding requirements for its use while leaving an impactful legacy.

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.



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PERSONAL PLANNER

[Life Insurance - Costs and Benefits](#)

Let's look at the "top five" reasons people give for not owning life insurance.

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[Tips and Tools for Retiring Abroad](#)

What are the key factors to consider when retiring abroad? My husband and I will soon be retiring and are interested in moving outside of the United States.

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DONOR STORY

[Property Turns Into Income](#)

Miranda lived in the family home where she and her spouse had raised their three children. After her spouse passed away, Miranda found it increasingly difficult to care for her property.

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WASHINGTON NEWS

[Secure 2.0 Increases Retirement Accounts](#)

The Secure 2.0 Act of 2022 was signed into law in late December 2022. It included several benefits that enable employees to increase their retirement account value. These provisions include a change in the required minimum distribution (RMD) age from 72 to...

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FINANCES

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Thank you for your interest in planned giving. To access any of our resources, please go to our [website](#).

FREE ESTATE PLANNING GUIDE

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.



[Download Guide »](#)

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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