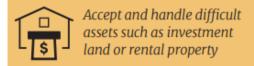
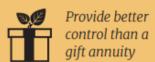


Wednesday, March 3, 2023

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:







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 <u>718-965-7375</u> 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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Thank you for your interest in planned giving. To access any of our resources, please go to our <u>website</u>.

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