



Wednesday, March 8, 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 [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



[Irrevocable Life Insurance Trust \(ILIT\)](#)

Susan and Steve have been talking to their tax attorney, Elizabeth, about plans for their family. Susan is very concerned about their family.

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SAVVY LIVING



[How to Spot Signs of a Thyroid Problem](#)

I have had several health issues over the past few years. Someone recently suggested that my thyroid might be causing some of my health problems. What are some common symptoms of thyroid dysfunction?

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DONOR STORY



[Flexible Deferred Gift Annuity](#)

Luis is a 54-year-old executive at a large healthcare company. He purchased company stock during years when the stock price was low, and now the stock has grown substantially in value.

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WASHINGTON NEWS



[IRS Reminder to Report All Income](#)

On March 1, 2023, the Internal Revenue Service (IRS) published a reminder to taxpayers that all income must be reported. This will include income from the gig economy, service industry income tips, any purchase, sale or exchange of digital assets, income from...

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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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