



Charitable Remainder Trust

Giving through a Charitable Remainder Trust allows you to receive income for the rest of your life, knowing that whatever remains will benefit your community.

How it works

- You transfer cash, appreciated stocks, real estate or other assets into a trust.
- You receive an immediate charitable tax deduction for the charitable portion of your trust.
- The trust pays you or a beneficiary you designate regular income payments.
- Upon the beneficiary's death or after a defined period of years, the remaining assets in the trust transfer to the Women's Fund for the Fox Valley Region.
- We will set up a special fund in your name, in the name of your family, or in honor of any person or organization you choose.
- We handle all the administrative details after the fund is established, issuing grant awards in the name of the fund to charities supporting women and girls.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing the needs of women and girls. Your gift - and all future earnings from your gift - is a permanent source of community capital, helping to create long-term social change.

women's fund
for the fox valley region, inc.

4455 W. Lawrence Street • Appleton, WI • 54914
(920) 830-1290 • fax (920) 830-1293
www.womensfundfvr.org • info@womensfundfvr.org

Ten reasons people choose to give through the Women's Fund

One

We are a **local organization** with deep roots in the community.

Two

Our professional staff has **broad expertise** regarding community issues and needs

Three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

Four

Our funds help people **invest in the women's issues** they care about most.

Five

We accept a wide **variety of assets**, and in partnership with the Community Foundation, can facilitate even the most complex forms of giving.

Six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

Seven

We offer maximum **tax advantage** for most gifts under federal law.

Eight

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

Nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

Ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

More Benefits

You may choose to receive a fixed income or one that changes with market conditions - income from the Charitable Remainder Trust you establish may add up to more than interest and dividends you earned from holding the assets. You can use it to supplement your own lifestyle or that of someone else: a sibling, a dependent parent, a friend or a former employee. You can start receiving annuity payments immediately, or defer them to increase your charitable income tax deduction.

A portion of the income may be a tax-free return of principal, while some is taxed as ordinary income or capital gains. The amount of annuity paid and the tax deduction received depend on the age of the recipient and the current annuity rate (as established by the Internal Revenue Service).

You can pick one of these options for your Charitable Remainder Trust:

- **Annuity trust** pays you a fixed dollar amount.
- **Standard unitrust** pays you an amount equal to a fixed percentage of the net fair market of the trust and is recalculated annually.
- **Net income unitrust** pays you the lesser of the fixed percentage specified by the trust agreement or actual trust income; some net income unitrusts allow you to make up deficiencies in past years.
- **Flip unitrust** is a net income unitrust that converts to a standard unitrust upon a triggering event, such as the sale of an asset used to fund the trust.

The Women's Fund provides a simple, powerful and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate or other assets to the Women's Fund. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact the Women's Fund for the Fox Valley Region at (920) 830-1290.