

## A Gift That Pays You Back

### *Charitable Remainder Trust*



For many people, philanthropy begins with what matters most in their lives and the dreams they have for future generations. At the Alzheimer's Association, our vision is a world without Alzheimer's disease. With thoughtful planning, you can help us achieve that vision while also increasing your family's financial security.

Establishing a charitable remainder trust is a great way to support Alzheimer's care, support and research while receiving income for life or a set number of years.

### **HOW IT WORKS**

- You work with your attorney to draft a trust document and name the Alzheimer's Association as a charitable remainder beneficiary.
- You fund your charitable remainder trust using cash, securities or real estate. (Most trusts are funded with a minimum of \$100,000.)
- You choose the people you want to receive payments from the trust — you, a family member or another loved one. The payments continue for the lives of the named beneficiaries or for a term of up to 20 years.
- You may choose a fixed or flexible payout rate, depending on your comfort.
- You decide who you want to manage the trust. You may manage it yourself or hire a bank, attorney, financial advisor or someone you trust.
- At the end of the trust term, the remaining amount goes to the Alzheimer's Association to fulfill your philanthropic purpose.

## HOW YOU BENEFIT

- Your trust provides payments for life or a fixed number of years.
- You have flexible funding options including cash, securities or real estate.
- Your trust investments help diversify your portfolio.
- You make smart tax moves. You receive a charitable income tax deduction if you itemize your taxes. And if you donate appreciated securities or property, the trust can sell those assets and reinvest the full amount without incurring capital gains tax.



*“Creating a charitable remainder trust allowed us to accomplish two things at once: generate income in our retirement and support the Alzheimer’s Association. It feels wonderful to help people in our state through the Alzheimer’s Association.”*

- Richard and Glenna Palmer

*The Alzheimer’s Association does not serve as trustee for charitable trusts. Content found here is for educational illustrative purposes only and is not professional tax or legal advice. It is important to consult with an attorney and/or tax advisor about your specific situation and whether your gift is deductible.*

## WE’RE HERE TO HELP

We can help you decide on a gift that’s right for you. To notify us of a gift you’ve made or to discuss the best gift option for you, please contact:

Susan E. Carter, Director, Planned Giving  
Alzheimer’s Association

225 N. Michigan Ave., Floor 17, Chicago, IL 60601-7633

toll-free phone: 866.233.5148 (toll-free) | email: [plannedgiving@alz.org](mailto:plannedgiving@alz.org) | Tax ID#: 13-3039601

More information about ways you can create your legacy can be found at [alz.org/plannedgiving](https://alz.org/plannedgiving).

alzheimer’s  association®

THE BRAINS BEHIND SAVING YOURS.™