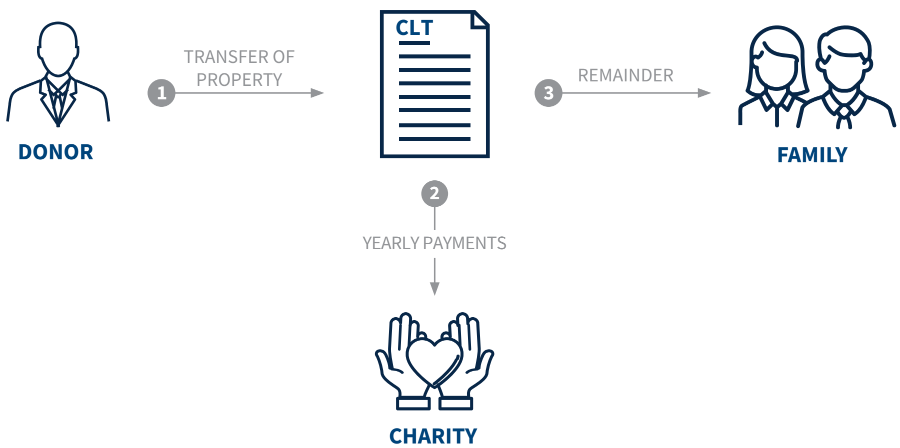
Charitable lead trust

Give to a favorite charity today and reduce or eliminate future estate taxes.

For charitable-minded individuals, a charitable lead trust is an excellent way to contribute to your favorite charities, while also reducing or eliminating future estate taxes for beneficiaries.

HOW DOES A CHARITABLE LEAD TRUST WORK?

A charitable lead trust is an irrevocable trust that enables you to give money or property to a charity on a regular basis. Distributions can be made monthly or quarterly, for example, but no less than annually. The charitable gifts reduce the value of your taxable estate, thereby reducing the federal estate tax liability. In some cases, the estate tax may be eliminated altogether. After a specified period of time or upon death, the remaining trust property passes back to you or your designated beneficiaries.



WHAT ARE THE BENEFITS?

- Reduces or eliminates potential federal estate or gift tax liability to the donor
- Benefits both charitable and non-charitable beneficiaries
- You choose term of trust and payout to charity
- Can be structured as a grantor or nongrantor trust
- Type of assets donated may vary
- Makes a difference in people's lives and communities for years to come

To learn more about establishing a charitable lead trust, talk to your Raymond James financial advisor. We recommend you work with your financial advisor alongside your legal and tax professionals to coordinate the most appropriate charitable solution for your situation.

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