

Benefits of a Charitable Remainder Trust:

- By making a gift of an appreciated asset, you can avoid the capital gains tax that would otherwise be due if you sold the asset.
- You may be entitled to receive a significant income tax deduction based on the value of the asset you transfer to the trust.
- The trust will pay an income to whomever you designate, for life or for a term of up to 20 years.
- The trust can increase your retirement income and financial security.
- **Below-** One of our treasured planned givers, the late Arnold Hornbuckle, who established a Charitable Remainder Trust to benefit Huntsville Hospital's heart patients. .



May we help you?

To learn more about how a charitable remainder trust could work for you, please contact us. Thank you for your interest in Huntsville Hospital Foundation.

I would like to learn more about charitable remainder trusts.

The best way to contact me is by:

Email Mail Phone

I've already included your organization in my estate plans.

Name: _____

Street: _____

City: _____

State/Zip: _____

Phone: _____

Email: _____

All inquiries are treated with complete confidentiality.

Lynne Berry

Planned Giving Officer

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



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Charitable Remainder Trust



What is a Charitable Remainder Unitrust?

This is a trust that provides you with the benefits of lifetime income, tax advantages, and the opportunity to leave a legacy to support Huntsville Hospital Foundation.



How does a Charitable Remainder Trust work?

You work with an attorney to establish the trust.

You transfer your asset to fund the trust. You may benefit from an income tax deduction in the year you make your gift.

You appoint a trustee. The trustee sells the trust assets tax-free.

The trust is invested. It pays income to whomever you designate - yourself or someone else.

After you pass away, Huntsville Hospital Foundation receives the remaining trust assets. These assets can then be used to make a substantial difference in health care for our community for generations to come.

Charitable Remainder Unitrusts (CRUTs) distribute a fixed percentage based on the balance of the trust assets (revalued annually). Additional contributions can be made to the trust.

Charitable Remainder Annuity Trusts (CRATs) distribute a fixed annuity amount each year and additional contributions are not allowed.



To consider -

- If you own assets that have grown significantly but produce very little income, you may want to consider a charitable remainder trust.
- Appropriate assets used in this strategy include real estate, business interests, and other hard-to-sell capital assets.

"A charitable remainder trust relieves you of the burden of managing property or assets. It provides an income and ensures that you will leave a legacy. It is an investment in your future and in the hospital's future." - Lynne Berry, Planned Giving Officer.

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