

THE GIFT THAT LEAVES MORE FOR YOUR FAMILY

Charitable Lead Trust



PEDDIE

MORE FOR US, MORE FOR YOUR LOVED ONES.

Imagine! You can greatly reduce or completely avoid gift and estate tax on assets you pass on to your family, simply by placing them in a trust and directing enough of the trust income over a period of years to support the mission of Peddie School.

A charitable lead trust holds your gift of appreciating assets, pays income to Peddie School for a period of years, and then gives the remaining principal to you or your heirs. Many people find it to be a useful tool for family wealth planning. You can use it to make a generous gift and, at the same time, shelter growing assets that will be passed to your heirs.

A CHARITABLE LEAD TRUST COULD BE RIGHT FOR YOU IF...

- You have appreciating assets that you want to pass on to the next generation.
- You want to reduce or eliminate your gift and estate taxes.
- You have an asset you wish to pass intact to the next generation, such as a family vacation home.
- You want to make a significant gift to Peddie School that benefits our mission today.

INTERESTED?

Contact us for sample charitable trust agreements and suggested language to share with your legal advisor. We would happy to help you understand the different kinds of charitable trusts and collaborate with your advisors to shape a trust uniquely suited to your goals.

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Peddie School provides support for a full range of charitable gift planning options and services. Peddie School, its employees or representatives, do not offer legal or financial advice.

IF YOU SET YOUR INCOME TERM LONG ENOUGH AND YOUR PAYOUT RATE HIGH ENOUGH, YOU MAY BE ABLE TO COMPLETELY “ZERO-OUT” GIFT TAX.

PLANNING POINTS AND BENEFITS

- Your trust can be funded with shares in a growing family business, thus lowering the cost of passing ownership on to the next generation.
- The income earned by a “non-grantor” lead trust is not taxable to you.
- The trust can run for a term of years or the lifetime of an individual.
- Unlike most other gift plans, a lead trust provides immediate benefits to Peddie School. Payments from your trust can be used to fund capital projects, annual support or an endowment.
- Charitable trusts are very flexible, so you can arrange a trust uniquely suited to accomplish a variety of your charitable and financial goals.
- You hold appreciated property and would like to avoid capital gains tax.

