



Charitable Lead Trust

How It Works

- You contribute securities or other appreciated assets to establish a Charitable Lead Trust. Our suggested minimum gift is \$1,000,000.
- The trust makes annual payments to St. Luke's University Health Network for a period of time.
- When the trust terminates, the remaining principal is paid to you or your heirs.

Benefits

- The income payments to us for a term reduce the ultimate tax cost of transferring an asset to your heirs.
- The amount and term of the payments to St. Luke's can be set so as to reduce or even eliminate transfer taxes due when the principal reverts to your heirs.
- All appreciation that takes place in the trust may be passed on tax-free to the individuals named in your trust.