



Charitable Remainder Unitrust

How It Works

- You transfer cash, securities, or other appreciated property into a trust. The required minimum for this type of gift is \$100,000.
- The trust pays a percentage of the value of its principal, which is revalued annually, to you or beneficiaries you name.
- When the trust terminates, the remainder passes to St. Luke's University Health Network to be used as you have directed.

Benefits

- Receive income for life or a term of years in return for your gift.
- Receive an immediate income tax *deduction* for a portion of your contribution.
- Pay no upfront capital gains tax on appreciated assets you give.
- You can make additional gifts to the trust as your circumstances allow for additional income and tax benefits.