

What Everyone Should Know
About A Charitable Trust from the
Masonic Villages
&
How to Use it in the Most Tax
Efficient Manner

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When should I consider a charitable trust?

- I own assets such as a house or stocks that are highly appreciated
- I have a traditional IRA in excess of \$250,000
- I am a PA resident and plan to leave the bulk of my estate to heirs subject to a 15% inheritance tax (i.e., nieces, nephews, friends, etc.)
- I would like to provide for my heirs over a period of years rather than an outright gift
- I want to protect my assets from being reached by creditors of my heirs
- I WANT TO SAVE TAXES
- I want to help charity from the taxes I save

If you said yes to any of the above consider this.

- A Charitable Remainder Trust (CRT) from the Masonic Villages may just be the ticket for you
- You can save taxes
- Provide a stream of income to your heirs
- Protect your assets from creditors
- Provide for charity from the taxes saved

- READ ON TO SEE HOW WE CAN HELP

What can an MV CRT do for You & Your Heirs?

- Avoid spendthrift issues (this means the heirs cannot get to all the inheritance at once and spend it)
- Protect heirs from creditor or marital issues
- Provide access to professional money manager at a very favorable rate
- **SAVE TAXES**
- Provide comfort of knowing MV will be there as trustee to serve your heirs
- Provide ability to direct tax savings to favorite charities at no cost to heirs
- Assure you that assets go where you want
- Usually provides a steady stream of increasing payments each year over the long term

Notes

Personal Illustration Request Form

If you would like to receive a personal illustration on how a CRT can benefit you and your family, please complete the data information form below and return it to your local gift planner for processing.

1. Name of donor(s) _____

2. Names(s) of relatives receiving income from CRT: 1. _____ 2. _____
3. _____ 4. _____

3. Term of CRT: Life or lives of relatives Term of years (up to 20 years) # of Years _____

4. Amount of CRT (\$250,000 minimum) \$ _____

5. Are there any other charities besides Masonic Charities to receive any remaining assets at the end of the term of the CRT: Yes No

If yes, please list other charities:

1. _____ 2. _____ 3. _____

6. What amount of assets for CRT are from IRA, if any \$ _____

7. What percentage of the CRT assets each year would you like to be paid out to your relatives (minimum 5%) _____%

8. Please email my personal illustration to _____ or mail it to the following address:

9. Please contact me at () _____ to further explain the details of my personal illustration.

10. Use Business Reply Envelope, if attached, or mail completed form to:
Office of Gift Planning
One Masonic Drive
Elizabethtown, PA 17022
(800) 599-6454