



## Charitable Remainder Trust

Do you have valuable assets, such as appreciated stocks or a second home, that are “tied up” and not producing income? Would you like additional income for yourself, your spouse, a parent, or a child? Would you like to leave a generous gift to the Ossabaw Island Foundation, Inc.? If your answer is “yes” to all of the above, then a Charitable Remainder Trust may be your perfect choice.

### Charitable Remainder Trusts Funding Options

- Your assets (e.g., cash, stock, bonds, real estate, retirement account, life insurance) are used to create a trust fund, which is then invested.
- You decide whether to base your payments on a percentage of the initial trust (Annuity) or a percentage of the trust’s value as it is revalued annually (Unitrust). Scheduled payments then come to you during your lifetime or the trust period.
- Afterward, the remaining assets pass to the Ossabaw Island Foundation, Inc. providing an incredible legacy for your interest in sustaining the mission of the Ossabaw Island Foundation.

In addition to providing income, a Charitable Remainder Trust could have double tax benefits for you:

- 1) You receive an immediate income tax deduction for a portion of the trust’s value.
- 2) You bypass capital gains taxes for appreciated assets.

To request a personalized proposal based on your circumstances, you should discuss it with your lawyer, financial advisor or contact Elizabeth DuBose, Executive Director, Ossabaw Island Foundation by telephone 912-344-3900 or email [elizabeth@ossabawisland.org](mailto:elizabeth@ossabawisland.org).

***\*The material provided is not offered as legal or tax advice. Examples of prospective benefits may not apply to your situation at the time of your gift. We encourage our donors to seek the advice of a tax advisor, attorney, and/or financial planner.***

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