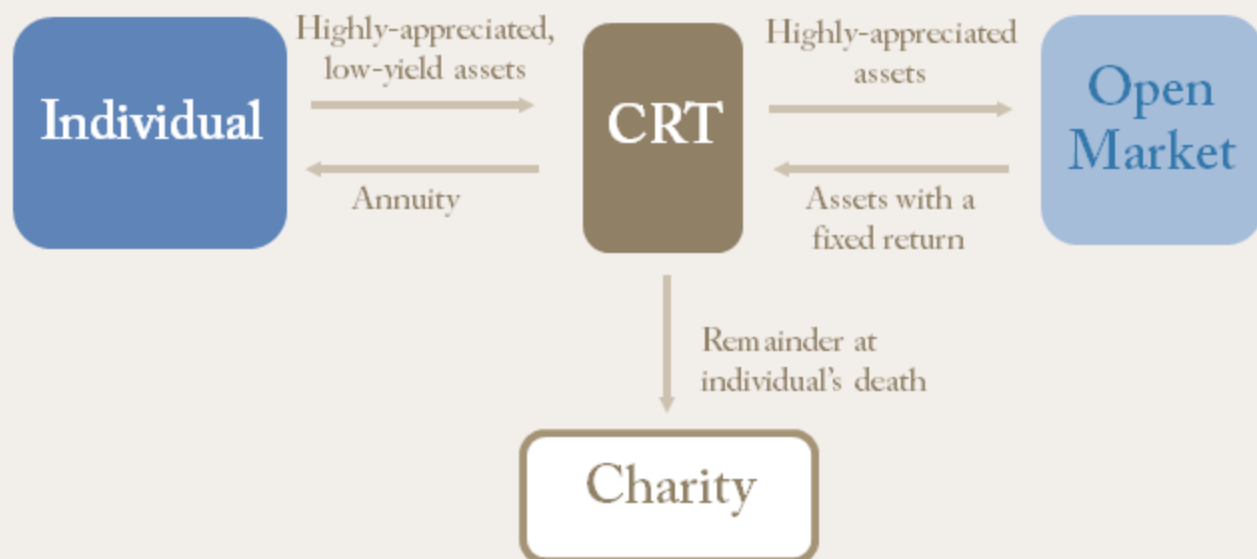


# Charitable Remainder Trusts

**CHALLENGE:** Convert highly-appreciated, low-yield assets to high-yield annuity while obtaining tax advantage.

**SOLUTION:**



**BENEFITS:**

- Claim income tax charitable deduction upon funding.
- Defer capital gain from asset sale.
- Increase investment yield.
- Exclude trust property from taxable estate.
- Support one or more charities.