

Bequests from your will or trust are the most common way to leave a gift to Tohono Chul such as Charitable Remainder Trusts:

CHARITABLE REMAINDER TRUSTS:

A charitable remainder trust lets you convert highly appreciated securities or real estate income for life or a term of years without incurring capital gains tax when the asset is sold. The appreciated asset is transferred into an irrevocable charitable remainder trust to be sold by the trustee. The proceeds are invested and you or your beneficiary(s) receives income for life or a specified term of years. When the trust terminates the remainder will be used by Tohono Chul's Board Restricted Fund. The income from this fund will benefit the Park for years to come. A charitable remainder trust will provide you with a set percentage of the value of the trust's assets, which is revalued each year. A charitable remainder annuity trust provides fixed income payments which are determined when the trust is set up. The annuity trust is a good option if you wish to avoid market risk.

Your benefits include:

- a. Income for life or a term of years.
- b. Potential for low-yielding assets to turn into more income
- c. A significant income tax deduction.
- d. No capital gains tax at the time of the gift if appreciated assets are used.
- e. Potentially reduced estate taxes and probate costs.

As with any planned gift, please be sure to consult with your own financial advisor and attorney before making a gift.