

# A GIFT OF CHARITABLE REMAINDER TRUST



Keeping families close™

The mission of Atlanta Ronald McDonald House Charities is to transform pediatric healthcare access and experiences for families with ill, injured or recovering children through a network of Houses, Family Rooms, Care Mobiles, and community resources.

Platinum Transparency 2023

Candid.

Charity Navigator

FOUR-STAR

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Note: This information is not intended as legal or tax advice. To ensure the best match for your individual goals and charitable vision, please consult with an attorney or professional advisor.

## RECEIVE LIFETIME PAYMENTS FOR YOUR GENEROSITY

If you are looking for ways to receive reliable payments while making a significant gift to **Atlanta Ronald McDonald House Charities**, you may want to consider a charitable remainder trust.

### HOW IT WORKS

With this type of gift, you create the trust and fund it with assets, such as cash, real estate or appreciated securities. You receive income (either a variable or fixed dollar amount) each year for the rest of your life or for a period of up to 20 years from the trust. At the end of the trust term, the balance in the trust goes to support our mission.

### YOUR BENEFITS

- Qualify for an income tax charitable deduction, when you itemize
- Up-front capital gains tax elimination
- Potential for increased disposable income
- Professional management of assets available

### STEPS TO TAKE TO MAKE YOUR GIFT

Decide which asset(s) to donate. You can fund your trust with a variety of assets. Appreciated securities you've owned for more than one year are an ideal choice, because you could possibly boost your cash flow with a higher payout from the trust.

1. Choose who receives the payment. Your trust can make payments to you and other beneficiaries you choose, such as a spouse or a child.
2. Identify the income you want from the trust. The rate of payment must be at least 5 percent of the trust asset's value.
3. Determine the length of the trust. The term of your trust can be the lifetime of the beneficiaries you select or for a period of up to 20 years.
4. Contact **Marissa Greider** to help you determine, with your financial advisors, if creating a charitable remainder trust is right for you.

### How It Works

