

CUSTOMIZE YOUR CONTRIBUTION

Put cash, securities or property into a trust, and receive income for life.



PEDDIE

ONE GIFT. SO MANY BENEFITS.

With a charitable remainder trust, you can meet your personal financial goals while providing enduring support for the mission of Peddie School.

You can use almost any asset to fund your trust—cash, stock, real estate, collectibles, or even an interest in your business. The trust and pays you or a loved one a portion of the income it generates.

You cannot revoke the gift, but you can set up the terms to accomplish your goals. For example, you can opt for fixed payments or a percentage based on the trust's annual value, which means your payments may increase over time. When the trust ends, the balance goes to support the area of our mission that is most important to you.

A CHARITABLE REMAINDER TRUST IS SOMETIMES MORE BENEFICIAL TO THE DONOR THAN KEEPING AN ASSET OR SELLING IT OUTRIGHT.

HOW IT WORKS

- You transfer cash, securities or other appreciated property into a trust.
- The trust pays a percentage of the value of its principal, which is valued annually, to you or other beneficiaries you name.
- There are trusts that provide fixed or variable income, and trusts that distribute income upon retirement or other life events.
- When the trust terminates, the remainder passes to Peddie School to accomplish the mission you believe in.

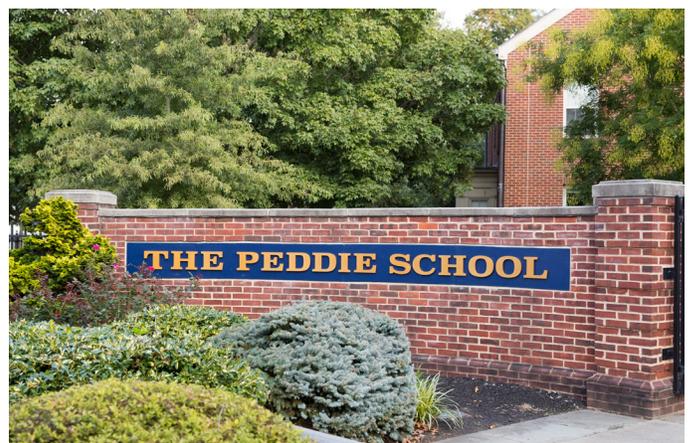


A CHARITABLE REMAINDER TRUST COULD BE RIGHT FOR YOU IF...

- You want to make a significant gift to Peddie School while retaining or increasing your cash flow.
- You hold appreciated property and would like to avoid capital gains tax.
- You want an opportunity for your income to grow over time.
- You like the idea of maximum flexibility in setting up the terms of your gift.
- You have a high net worth and would like to reduce the taxes on your estate.

BENEFITS

- You get cash flow in return for your gift.
- You receive an immediate income tax deduction.
- If you fund your trust with appreciated securities, you pay no up-front capital gains tax.
- Using an asset to fund a trust can be more beneficial than keeping it or selling it outright.
- You can make additional gifts to the trust as your circumstances allow to gain additional cash flow and tax benefits.
- The charitable remainder trust is very flexible, so you can arrange a trust uniquely suited to accomplish a variety of your charitable and financial goals.



INTERESTED?

Contact us for sample charitable trust agreements and suggested language to share with your legal advisor. There are many types of charitable trusts, and we would happy to help talk through the options and collaborate with your advisors to shape a trust uniquely suited to your needs.

PEDDIE

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