

GIFTS THAT PROVIDE INCOME

A New Leaf accepts several types of gifts that return income to donors and/or their beneficiaries for life, or a specific period of time, before A New Leaf is permitted to use the gift.

Each of the gift types listed below may provide an income tax deduction, reduce capital gains tax, and reduce future estate or gift tax owed.

CHARITABLE GIFT ANNUITY

A Charitable Gift Annuity (CGA) is an annuity contract that you fund with cash or appreciated securities. In return, you and/or your beneficiary receive regular income payments for life with the remainder going to A New Leaf. In addition to potential tax benefits described above, your annuity payments may be partially tax-free. A New Leaf will work with you and a trusted third-party CGA administrator whose reserve assets back the annuity payments.

CHARITABLE REMAINDER TRUST

A Charitable Remainder Trust (CRT) is a trust that you fund with appreciated securities or other assets, that pays income to you and/or other beneficiaries for life or term of years. At the end of the term, the remainder goes to A New Leaf. You are able to sell the assets tax free in the trust, which can enhance your income. You may also receive an income tax deduction for your future gift to A New Leaf.

CHARITABLE LEAD TRUST

A Charitable Lead Trust (CLT) is a trust that you fund with cash or appreciated securities that pays A New Leaf a fixed dollar amount or percentage of assets for a period of years. At the end of the term, the remaining assets are distributed back to you or to your heirs. With a CLT, you may avoid taxes from appreciation on assets held by the trust, and you may be able to set the amount and term of payments to reduce or eliminate transfer taxes when the principle returns to you or your heirs.

A New Leaf recommends that you consult your legal or financial advisors when considering what type of planned gift best suits your unique circumstances.

For more information about making an income producing gift, please contact:



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The information provided on this website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.