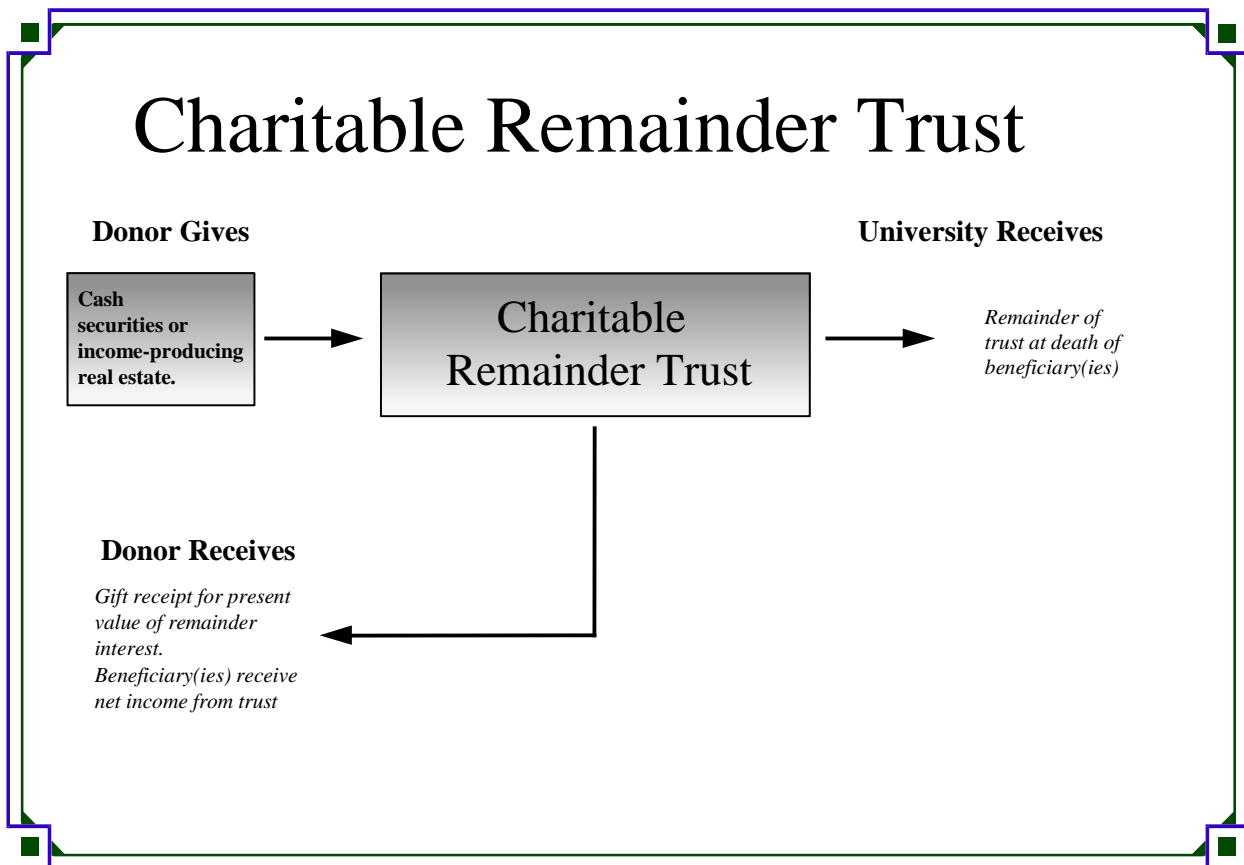


**Charitable Remainder Trust:** A future gift that gives you income now.

**Overview:**

If you have assets that you would consider gifting to the University of Victoria in your Will but would like to receive the income for life and the tax benefits today, a charitable trust arrangement may be the answer.

The charitable remainder trust is a form of residual interest gift. You (the “settlor”) transfer property to a trustee who holds and manages it. If the property is income-producing, the net income can be paid to you and/or others you have named. When the trust terminates (either upon your death, upon the death of the other named beneficiary(ies) or after a specific number of years), the trust remainder is distributed to the University of Victoria.



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*Impact countless tomorrows.*

## Ways to Give, continued

### Charitable Remainder Trust, continued

#### Benefits to You:

- As the trust is irrevocable, you receive an immediate tax receipt for the present net value of the remainder interest.
- You receive an annual income from the assets in the trust. Depending on the structure of the trust, income payments may be made annually, bi-annually or monthly.
- Irrevocable trust assets are not included in the value of your estate, and therefore not subject to probate fees or estate income taxes.
- A trust provides privacy and professional management by appointed trustees and is less susceptible to challenge than a gift by bequest.
- The trust agreement can be kept private, unlike a Will, which may become a public document upon the donor's death.

*Our goal is to ensure your legacy is managed and administered according to your wishes. We can work closely with you and your advisors to capture the true spirit and intent of your donations. The University of Victoria does not provide legal, accounting, tax or financial advice to donors with respect to gifts. Please consult with your financial advisor to ensure your gift is structured in accordance with your personal circumstance and that the related tax implications have been thoroughly considered.*

For more information, contact **Deborah Walker**, Manager, Planned Giving & Estate Administration

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