

# *Your Legacy of Hope:*

Strategic Giving that Benefits You and  
Cancer Support Community Pasadena



**CANCER SUPPORT  
COMMUNITY**  
GREATER SAN GABRIEL VALLEY

## WHEN TO CHOOSE GIVING THROUGH A TRUST

### Establishing a Trust may be a wise choice

Establishing a trust to assist *Cancer Support Community Pasadena* offers you benefits while strengthening our work:

- To receive an annual income and make a future donation to CSCP, consider a Charitable Remainder Unitrust (CRUT). This provides you and/or another beneficiary (up to two total) annual income based on a fixed percentage (determined by you when the trust is established) of the value of the trust assets. You receive an immediate tax deduction based on the percentage of annual income you choose and your age (or the age of another, younger beneficiary if you establish the trust with two beneficiaries). The trust will terminate upon the death of the longest surviving beneficiary and any remaining assets transfer to CSCP. If you fund this trust using appreciated assets, generally capital gains taxes are waived.
- To receive fixed annual income (rather than an amount based on a percentage of trust assets), consider a Charitable Remainder Annuity Trust (CRAT). Other than providing a fixed payment rather than a variable payment, a CRAT is identical to a CRUT.
- To provide annual donations for CSCP for a fixed number of years, consider a Charitable Lead Trust (CLT). The estimated value of the annual donations is tax deductible to you in the year you establish the trust. At the conclusion of the trust, all remaining assets in the trust are transferred to your named beneficiaries. This transfer may be at a lower tax rate, depending on circumstances.
- You will be welcomed into our *Legacy of Hope Society*, a group of likeminded men and women who share your commitment to making sure that future generations will have our support on their cancer journey. As a member, you will be entitled to all benefits of this exclusive society.
- You will be assured that your life will be a living legacy through the work of *Cancer Support Community Pasadena*.

### Your needs and desires

You desire to receive an income for life or **leave a legacy** for your heirs, in addition to making a **donation (current or deferred)** to CSCP. You also want to **maximize your tax savings**.

### How to give a gift through a Trust

To learn more, we invite you and/or your advisor to arrange a confidential conversation with us at no obligation. You and your legal advisor will work together to determine the best form of a Trust for your circumstances, and to establish the Trust. When establishing the Trust, please indicate if the donation portion (immediate or future) is for the greatest need, a designated program or towards our endowment fund.

### What steps to take to make this gift

Please contact your advisor(s) directly to begin the process of establishing a Trust. Your advisor(s) can help you choose which kind of Trust will be most advantageous to you, given your particular circumstances. The trustee you select has the responsibility to manage the assets of the trust and make the payments as you instructed. There are legal requirements for a trustee so you should exercise care in selecting the trustee to ensure your Trust will achieve your long-term goals.

When making any planned gift, please notify us of your intentions so we can honor your desires and welcome you into the *Legacy of Hope Society*. Thank you!

The mission of Cancer Support Community is to ensure that all people impacted by cancer are empowered by knowledge, strengthened by action, and sustained by community. Your Legacy of Hope Gift to Cancer Support Community can extend this mission for generations to come.

The above information is not intended as legal or financial advice; please consult with your financial advisor and/or tax attorney on the best way to prepare an estate plan or legacy gift strategy for yourself and your family. Cancer Support Community Pasadena is a 501(c)(3) nonprofit organization; our Federal Tax I.D. number is 95-4201985.