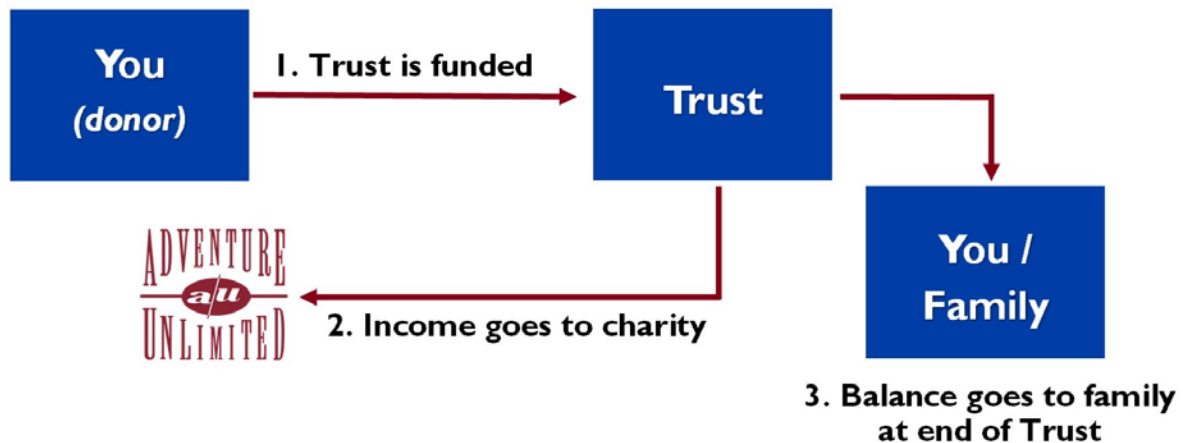


Charitable Lead Trust

How a Charitable Lead Trust Works



Benefits of a Charitable Lead Trust Gift

- Maximize asset transfer to family members at reduced or eliminated estate taxes.
- Generate a stream of fixed or variable payments for one or more charitable organizations.
- Have an immediate impact on Adventure Unlimited.
- Select your own trustee.

Transferring Assets to Heirs & Avoiding Estate Taxes

A charitable lead trust can be used to accomplish multiple estate planning goals, keeping assets within your family and minimizing taxes on transfers to heirs, while also making a major gift to Adventure Unlimited. Charitable lead trusts are especially appropriate for individuals with large estates. They are often the tool of choice for individuals with assets that have a high potential for future appreciation as the beneficiaries will reap the benefit when the trust ends.

We encourage you to speak about this gift opportunity with your attorney or tax professional. We would also be happy to coordinate a conversation with our financial advisors to determine if this is a viable opportunity to leverage a gift to Adventure Unlimited.

Contact: Rob Blackwell, rblackwell@adventureunlimited.org or 888.416.7348 x104