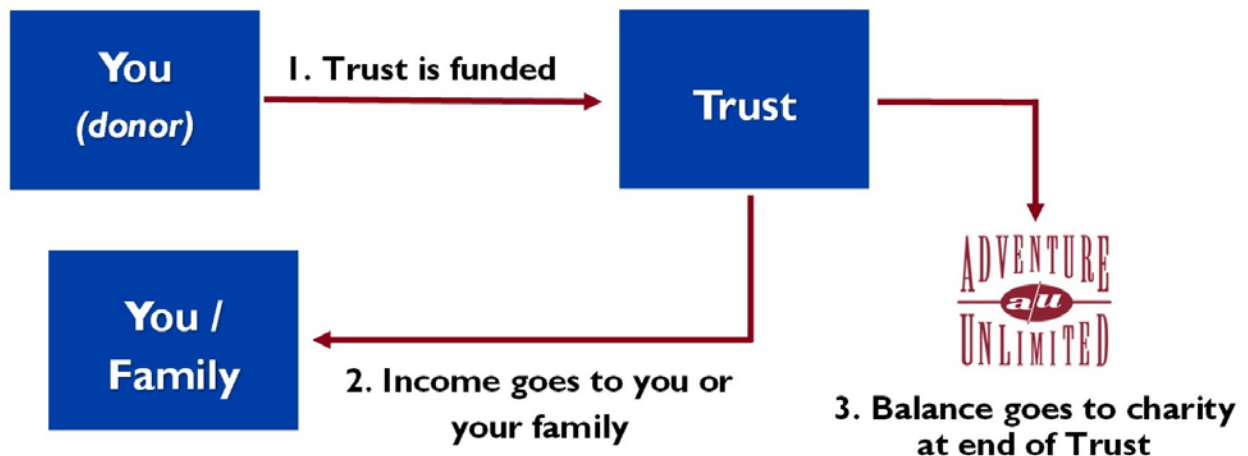


## Charitable Remainder Trust

### How a Charitable Remainder Trust Works



### Benefits of a Charitable Remainder Trust Gift

- Income to you or loved ones for life, lives or term of years
- Boost your retirement income with fixed or variable payments
- Avoid capital gains on the transfer of your appreciated assets
- Receive a current charitable income tax deduction for a portion of your gift
- Invest in the future of Adventure Unlimited

### Charitable Remainder Trust for Income

A charitable remainder trust makes fixed or variable payments to you and/or loved ones for your lifetime(s) or a period of years. With variable payments, your income has the potential to increase over time with growth in the trust, with proper planning and investments.

### How to Select the Right Trust Payout for You

Here are two trust payout options to meet your needs:

- Charitable remainder annuity trusts make fixed payments and are generally established through a gift of cash or marketable securities.
- Charitable remainder unitrusts make variable payments and can be funded with a wide variety of assets, including real property.
- A payout option used commonly for real property permits the trust to sell the property tax-free and then begin making payments to you after the property has been sold.

## Charitable Remainder Trust

(continued)

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](mailto:rblackwell@adventureunlimited.org) or 888.416.7348 x104

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Adventure Unlimited Foudation

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*Adventure Unlimited Foundation, serving DiscoveryBound and the A/U Ranches, is the fundraising arm of Adventure Unlimited, a 501(c)(3) charitable organization.*