

Charitable Lead Trusts

Empower Women Now and Provide for Your Heirs Later

A charitable lead trust is an estate planning option that allows you to support Women for Women International for a specific period of time while preserving assets for your heirs. It provides a way to transfer assets to family members or other beneficiaries at a reduced or potentially eliminated estate or gift taxes.

How it Works

Trust assets are often distributed at greatly reduced gift and estate tax rates. Depending on rates at the date of funding, you or your heirs can also relieve significant appreciation in these assets with no additional tax consequences.

Simple Steps:

1. You create a charitable lead trust and transfer assets into it. Cash, stocks, or other investments can be used to create the trust.
2. For a set term (either a number of years or the grantor's lifetime), the trust makes regular payments of either a fixed amount or a percentage of the trust's value) to Women for Women International.
3. After the specified term ends, the remaining assets in the trust are distributed to the donor's heirs or other non-charitable beneficiaries.

Questions?

I'm here to help with your questions. Please reach out to me as needed.

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Helping women survivors of war and conflict rebuild their lives.

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