



# Leave A Legacy: Charitable Trust

If you are looking for ways to receive reliable payments while making a significant gift to Ronald McDonald House Charities of Maine, you may want to consider a charitable remainder trust.

With this type of gift, you create the trust and fund it with assets, such as cash, real estate or appreciated securities. You receive income (either a variable or fixed dollar amount) each year for the rest of your life or for a period of up to 20 years from the trust. At the end of the trust term, the balance in the trust goes to support our mission.

*Alicia Milne*

Development Director  
(207)780-6282 ext. 331  
development@rmhcmaine.org

250 Brackett Street  
Portland, Maine 04102

654 State Street  
Bangor, Maine 04401

**Note:** This information is not intended as legal or tax advice.

To ensure the best match for your individual goals and charitable vision, please consult with an attorney or professional advisor.

## YOUR BENEFITS

- Qualify for an income tax charitable deduction, when you itemize
- Up-front capital gains tax elimination
- Potential for increased disposable income
- Professional management of assets available

## STEPS TO TAKE

**Decide which asset(s) to donate.** You can fund your trust with a variety of assets. Appreciated securities you've owned for more than one year are an ideal choice, because you could possibly boost your cash flow with a higher payout from the trust.

- 1)** Choose who receives the payment. Your trust can make payments to you and other beneficiaries you choose, such as a spouse or a child.
- 2)** Identify the income you want from the trust. The rate of payment must be at least 5 percent of the trust asset's value.
- 3)** Determine the length of the trust. The term of your trust can be the lifetime of the beneficiaries you select or for a period of up to 20 years.
- 4)** Contact **Alicia Milne** to help you determine, with your financial advisors, if creating a charitable remainder trust is right for you.

### How It Works

