



## Sterlynn Marx

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**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.

# 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.

## 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 **Sterlynn Marx** to help you determine, with your financial advisors, if creating a charitable remainder trust is right for you.

### How It Works

