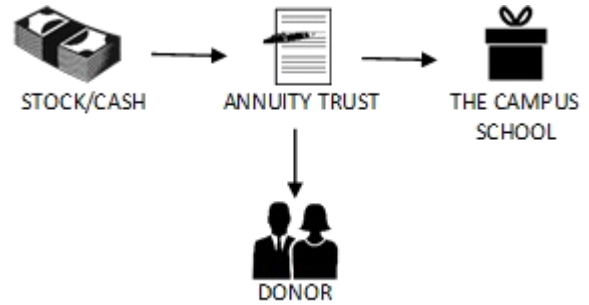




THE CAMPUS SCHOOL
of Carlow University



CHARITABLE REMAINDER ANNUITY TRUST

You may be looking for a way to receive fixed income for life or a number of years. You may be concerned about the high cost of capital gains tax with the sale of an appreciated asset. Perhaps you recently sold property and are looking for a way to save on taxes and plan for retirement. A charitable remainder annuity trust may offer the solutions you need.

Benefits of a Charitable Remainder Annuity Trust

- Receive fixed income for life or a term of up to 20 years
- Avoid capital gains tax on the sale of your appreciated assets
- Receive an immediate charitable income tax deduction for the charitable remainder portion of your gift to The Campus School

How a Charitable Remainder Annuity Trust Works

1. You transfer cash or assets to fund a charitable remainder annuity trust.
2. In the case of a trust funded with appreciated assets, the trust will then sell the assets tax-free.
3. The trust is invested to pay fixed income to you or any other trust beneficiaries you select based on a life, lives or a term of up to 20 years.
4. You receive an income tax deduction in the year you transfer assets to the trust.
5. The Campus School benefits from what remains in the trust after all the trust payments have been made.

More on Charitable Remainder Annuity Trusts

If you are tired of the fluctuating stock market and want to receive fixed payments, a charitable remainder annuity trust may provide you with the stability you desire. A charitable remainder annuity trust pays a fixed amount each year based on the value of the property at the time the trust is funded.

Contact us

If you have any questions about a about charitable remainder annuity trusts, please contact Tiffany Jimenez, Campus School Director of Development, at 412-578-6260 or via email at tmjimenez@carlow.edu