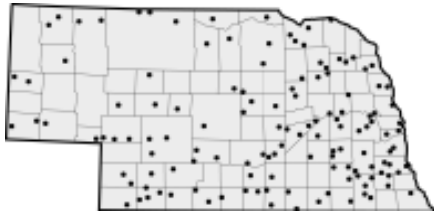


# Nebraska Community Foundation, Inc.

The Nebraska Community Foundation exists to help concerned individuals mobilize charitable giving to support the betterment of Nebraska communities and organizations. The Foundation is a nonprofit charitable corporation providing financial management, strategic development and education/training services to communities, organizations and donors throughout Nebraska. Started in 1993, the Foundation provides affiliated fund status (allowing communities and organizations to

achieve nonprofit charitable status without forming



their own nonprofit corporation) to more than 160 communities, organizations and donors. For more information about the Nebraska Community Foundation call 402/323-7330 or visit the website at [www.nebcommfound.org](http://www.nebcommfound.org).

The single most important factor in community success is involvement of citizens in their community. Your gifts of time, talent and dollars make a difference.

**Please consider what a charitable remainder trust would do for your community and for you.**



NEBRASKA COMMUNITY  
FOUNDATION  
Nebraska Community Foundation  
P.O. Box 83107  
Lincoln, NE 68501-3107

# Charitable Remainder Trusts

- ✓ A Gift for the Benefit of Your Hometown
- ✓ A Gift That Bypasses Capital Gains Taxes
- ✓ A Gift That Increases Lifetime Income

For the benefit of an affiliated fund of  
the Nebraska Community Foundation



Nebraska Community Foundation  
Mailing Address:  
P.O. Box 83107  
Lincoln, NE 68501-3107  
Delivery Address:  
650 J Street, Suite 305  
Lincoln, NE 68508  
402/323-7330  
402/323-7349 fax  
[www.nebcommfound.org](http://www.nebcommfound.org)

## ***Invest in Your Hometown With a Charitable Remainder Trust***

Many Nebraskans have found that the ability to make a gift to their Hometown today, while retaining the right to receive income, makes good financial sense.

## ***What is a Charitable Remainder Trust?***

A Charitable Remainder Trust is a legal instrument into which you transfer irrevocably the ownership of assets such as securities or real estate. In return you receive an immediate charitable income tax deduction and the right to receive an income. The income payments may be made to you and/or one or more other loved ones for life or for a limited number of years.

When the trust ends the property remaining in the trust (the charitable remainder) passes to the Nebraska Community Foundation to be used according to your directions to benefit your Hometown or other favorite charities.

## ***Types of Trusts***

You can select to receive a fixed dollar amount of income called an Annuity Trust. Or, choose to receive a specific percentage of the value of the property in the trust, called a Unitrust. If the value of the property in this type of trust increases, the income will increase. If the value of the property in this trust decreases the income will decrease.

**"People have plenty of opportunities to give their money away. Why not give it back to the community where you lived and made your money?"**

**-- Frank Sibert  
Foundation Board Member &  
Retired Rancher of Valentine**

## ***Requirements of Trust***

A Charitable Remainder Trust requires a trust document outlining how the trust will operate. Your legal advisor should draft or review this document to assure you that it complies with current laws.

In addition, you may serve as the manager, or "trustee", of your own trust. However, many Nebraskans choose to engage the services of a professional trustee to handle the details of managing their Charitable Remainder Trust.

## ***What a Charitable Remainder Trust can do for You:***

- Give you the satisfaction of making a gift today that will invest in your hometown in the future
- Bypass capital gains taxes on gifts of appreciated assets
- Provide tax-free growth of assets, increasing the value of your trust
- Increase your income from low yielding investments or property
- Provide a guaranteed fixed income, or
- Pay a variable income as a hedge against inflation
- Create an immediate charitable income tax deduction
- Relieve you of the burdens of management of your assets
- Allow additional contributions
- Reduce estate taxes and settlement costs

## **Would you like to learn more about the benefits of making a gift to your hometown or favorite charities by a charitable remainder trust?**

The Nebraska Community Foundation, in accordance with its mission, would be glad to help. You can:

1. Complete and return this form to the address listed below.
2. Contact one of the gift planners listed here:

**Jim Gustafson**

**Gift Planning Director**

[jgustafson@nebcommfound.org](mailto:jgustafson@nebcommfound.org)

(402) 323-7341

**Jeff Yost**

**President & CEO**

[jeffyost@nebcommfound.org](mailto:jeffyost@nebcommfound.org)

(402) 323-7332

Name(s) \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Phone(s) \_\_\_\_\_  
E-mail \_\_\_\_\_

\_\_\_\_ Please send me a personal illustration of how a charitable remainder trust could benefit my estate.

\_\_\_\_ I would like someone to contact me regarding a private and confidential visit about planning a gift from my estate.

\_\_\_\_ In confidence, I have already included my hometown in my will.

**Please Mail or Fax to:**

Nebraska Community Foundation

P.O. Box 83107

Lincoln, NE 68501-3107

Phone: (402) 323-7330 Fax: (402) 323-7349

Visit [www.nebcommfound.org](http://www.nebcommfound.org)