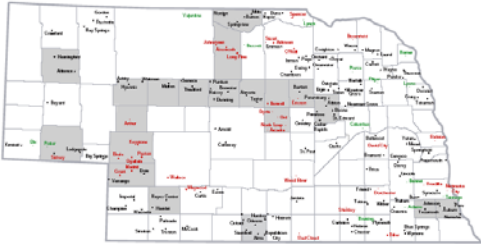


# Nebraska Community Foundation Inc.

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 170 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.

*Have you considered what a Bequest would do for your community and for you?*



Nebraska Community Foundation  
PO 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:*  
**PO Box 83107**  
**Lincoln, NE 68501-3107**  
*Phone:* **(402) 323-7330**  
*Fax:* **(402) 323-7349**  
[www.nebcommfound.org](http://www.nebcommfound.org)

## Invest in Your Community...

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 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  
Honorary 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.
- 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.

## More Information

**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. Please complete and return this form or contact one of the gift planners listed.*

Name

Address

City

State

Zip Code

Daytime Phone

Evening Phone

Email

- Please send me a confidential explanation 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.

## Questions? Contact:

**Jim Gustafson, Gift Planning Director**

(402) 323-7341

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

**Jeff Yost, President and CEO**

(402) 323-7332

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

**Please Mail or Fax to:**

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