CHARITABLE REMAINDER TRUSTS

With a charitable remainder trust, you can give to the University and receive income at the same time. A charitable remainder trust is established by making an irrevocable transfer of **cash**, **securities**, or **real estate** to a trust in exchange for, typically, **variable annual income for life or a term of years**.

You can make additions to a charitable remainder trust.

BENEFITS

Life income: You and/or your spouse, child, or other beneficiary receive income for life or a term of years.

Growth potential: To the extent that the trust principal grows over time, so will your payments.

Tax deductible: You receive an immediate deduction, equal to the present value of the remainder gift to the University, with the potential for other tax savings.

To begin receiving payments, you must be at least 55 years old. Your payout rate is decided when the trust is established, typically around 5 percent. Visit **giftplanning.uchicago.edu/calc** to calculate your payments.

HOW IT WORKS

1

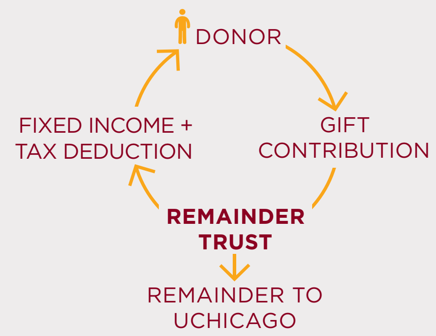
You transfer a minimum of $100,000 in cash, securities, or real estate to a University trust.

2

The trust pays you a fixed percentage of its value for life or a term of years.

3

Your gift is distributed to the University upon your death.



"We thought, wouldn't it be wonderful to know that our trust could directly benefit the University but also something deeply meaningful to us?"

—Michael Havercamp, AM'77, and Mary Havercamp, PhD'81

LEARN MORE

Visit **giftplanning.uchicago.edu/crt**.

THE UNIVERSITY OF CHICAGO | Office of Gift Planning