

CHARITABLE REMAINDER TRUST

If you are disappointed in the yield from your current investments in the stock and bond markets, but you want to avoid the capital gains tax that you would have to pay if you sold your investment, consider a Charitable Remainder Trust.

This plan will pay you, year after year, the same dollar amount you choose at the outset. The income payments can be fixed or variable, depending upon what you choose, and they are based on the starting valuation. Then, after your lifetime and the lifetime of the survivor beneficiary (if desired), the trust remainder is available to support the San Diego History Center's mission.

Benefits:

- Receive an income stream paid annually, semiannually, quarterly or monthly.
- Obtain a partial charitable deduction.
- Increase your income from a low-yield asset.
- Avoid up-front capital gains tax on long-term appreciated assets used to fund the trust.

To obtain a personalized illustration of how a charitable remainder trust with the San Diego History Center could benefit you specifically, please contact the Development Department at development@sandiegohistory.org or 619-232-6203 x102.