



FACT SHEET

Gifts of Charitable Remainder Trusts

A **Charitable Remainder Trust** is a way to give assets to Canadian Feed The Children through a trust agreement. A charitable remainder trust can be established by contributing bonds, stock securities, mutual funds or real estate to a trustee who holds and manages it. You may choose a charitable remainder trust because you have an asset that you would like to give to us in the future, but you need the income it provides or you do not wish to part with your asset now.

Why is a gift of a charitable remainder trust beneficial?

Tax Advantages – A charitable tax receipt is issued upon transferring assets to a trust naming Canadian Feed The Children as the capital beneficiary. The five-year carry-forward provision allows effective tax planning while you are alive rather than the one-year carry back upon death. The government has allowed a beneficial tax treatment of capital gains on these gifts.

Income – Your trust can provide you with a lifetime income.

Protects Privacy – By transferring assets to a trust, your decision is private.

Avoids Will Challenges – Trust assets are not considered part of your estate.

Eliminates Probate and Estate Fees – Your gift is not subject to probate fees or other costs.

Control – The trust retains your assets until death, at which point Canadian Feed The Children will receive the “remainder” of the property in the trust.

Worry-Free Management – Your trust can be managed professionally, freeing you from daily investment decisions or market concerns.

Recognition – Your gift can be honoured during your lifetime.

Opportunity – An opportunity to make a significant gift to champion change and help us build a bridge between those who can help and those who need help. Your gift can directly impact a child in poverty.

How does it work?

You receive a charitable tax receipt for the fair market value of the remainder interest, which is calculated by a Canada Revenue Agency formula that takes into account your life expectancy and the present value of the property being transferred into the trust. An important point to remember: the transfer of assets to the trust is irrevocable, which means you cannot reverse the transfer once it has been completed.

Please Seek Expert Advice: *Canadian Feed The Children strongly recommends that you seek professional advice to ensure your financial goals are considered, your tax situation reviewed, and your planned gift is tailored to your circumstances. For further information and sample Will bequest clauses, please contact Cheryl Weldon, Legacy & Leadership Giving Manager, toll-free at 1-800-387-1221 extension 227 or email cweldon@CanadianFeedTheChildren.ca.*

Gift Notification

Notifying us of your gift allows us to thank you personally, plan for future programs and projects that impact children around the world.

*Thank you for assisting us in our quest to create a world in which children thrive, free from poverty by considering making a planned gift to Canadian Feed The Children. **We cannot achieve this vision without you!***

Name _____

Address _____

City _____ Prov _____ Postal Code _____

Date of Birth _____ Telephone _____

Email _____

Type of Gift

Yes, I have made provision for Canadian Feed The Children and you may note my file as follows:

- Outright bequest in my Will \$ _____
- % of my estate in my Will _____%
- Trust under my Will with Canadian Feed The Children as the final beneficiary
- Publicly Traded Securities and/or Mutual Funds approx. \$ _____
- Registered Assets - RRSP or RRIF approx. \$ _____
- Life Insurance Policy approx. \$ _____
- Other (please describe) _____

- Yes**, I would like to be recognized for my gift, allowing other donors to understand how making such a gift can help children throughout the world.
- No thank you**, I would not like any type of recognition, and I would prefer my gift to remain private.

Date _____ Signature _____