

## CHARITABLE LEAD TRUST

- A tax savvy way of transferring assets to your heirs
- Can reduce gift taxes upon transfer
- May reduce taxation of your estate
- Avoid the tax on capital gain in your stock
- Your trust provides a stream of income to St. Francis

Your Charitable Lead Trust pays income to the Hospital. At the close of the trust, what remains can be transferred to loved ones in a tax efficient way because the appreciation is free of transfer tax. Or, you can have what remains returned to you.

This can be an excellent estate planning device that is typically used by those who have considerable assets to transfer to family members.

After you create your trust, we will be pleased to welcome you to membership in the Sr. Jean M. Pignone Legacy Society. You may make your membership anonymous if you wish.

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