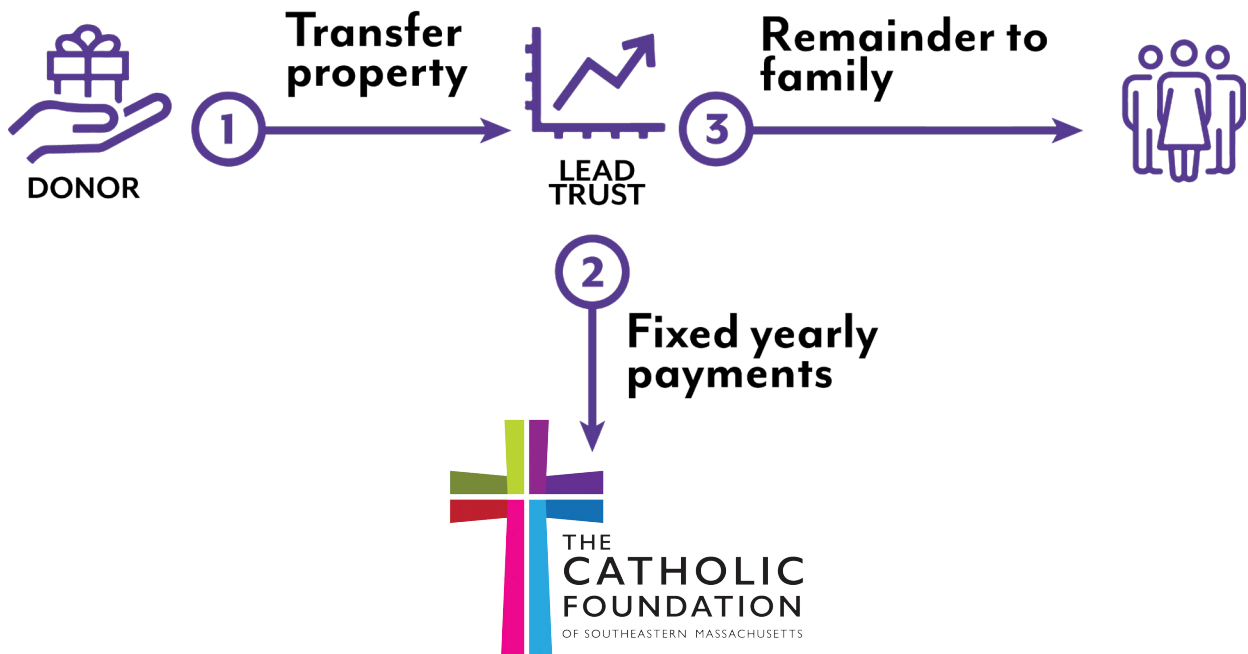




· DIOCESE OF FALL RIVER ·
INSPIRED BY THE SOUL OF CHRIST TO LEAVE A LEGACY OF FAITH

CHARITABLE LEAD TRUST

A gift that allows you to transfer wealth with significant tax advantages.



HOW IT WORKS

- You contribute securities or other appreciating assets to a Charitable Lead Trust. Our suggested minimum gift is \$500,000.
- The trust makes annual payments to The Catholic Foundation for a period of time to fund a program that you are passionate about supporting.
- When the trust terminates, the remaining assets and any appreciated value is paid to your heirs.

BENEFITS

- Income payments to us for a term reduce the ultimate tax cost of transferring an asset to your heirs.
- The amount and term of the payments to The Catholic Foundation can be set so as to reduce or even eliminate transfer taxes due when the assets revert to your heirs.
- You may designate whether gains in the value of the trust increase payments to The Catholic Foundation or may be added to the assets in the trust.

For more detailed information on making a gift to the Catholic Foundation for the benefit of the Diocese of Fall River, please contact us so that we can assist you through every step of the process.

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