

Creating Your Legacy: Charitable Trusts

Create a legacy that reflects your **personal values** while achieving your financial and **philanthropic goals**. Death with Dignity has a longstanding record of managing donations diligently and strategically to ensure your gift has a **lasting impact**.

There are many options for charitable trusts that can be set up to your advantage. Establishing a trust with Death with Dignity as the beneficiary ensures that your legacy continues long into the future. Your generosity and foresight allows Death with Dignity to grow the movement and expand end-of-life choice.

A trust can give you control over how your assets are managed while also generating income for yourself and your loved ones. There are several different types of trusts, each with specific criteria and benefits to you and/or your heirs.

CHARITABLE REMAINDER TRUSTS

You can donate assets to an irrevocable charitable trust that will pay you or your loved ones for life or a defined time period up to twenty years. The remaining assets in the trust will eventually become a gift to Death with Dignity. It can be funded with cash, appreciated real estate or securities, or other non-cash assets. You can select the number of beneficiaries and income payment you deem appropriate, as well as the frequency of the payments: quarterly, semi-annually, or annually.

This option comes with significant tax benefits, including a partial federal income tax charitable deduction and favorable capital gains tax treatment if funded with appreciated assets.

CHARITABLE REMAINDER UNITRUSTS

With a charitable remainder unitrust, your assets are revalued annually and you receive a fixed percentage of the asset balance. You have the opportunity to make additional charitable contributions to the trust at any time.

CHARITABLE LEAD TRUSTS

A charitable lead trust allows you to designate Death with Dignity as the “lead” beneficiary of your assets. Once a trust is established, Death with Dignity will receive annual payments from the trust for a set number of years. When the trust terminates, the remaining assets will be distributed to you or other beneficiaries at a reduced tax rate or tax-free.

Together, we can explore how you can create an estate planning strategy that meets your financial priorities, honors your personal values, and reflects your philanthropic **vision**.

You can discuss with your estate planning attorney your personal values and the specifics of the assets you wish to contribute. We can help you identify experts who can work with you to establish a trust.

INFORMATION YOU WILL NEED:

- Organization Name:
Death with Dignity National Center
- Address: 520 SW 6th Avenue #1220,
Portland, Oregon 97204
- Phone: (503) 228-4415
- Website: www.DeathwithDignity.org
- Tax ID: 93-1162366

This information is not intended as legal or tax advice.
For such advice, please consult an attorney or a tax advisor.

TO LEARN MORE, CONTACT:

- Amy Lavan, Leadership Giving Manager
- Phone: (971) 808-2851
- Email: alavan@deathwithdignity.org

