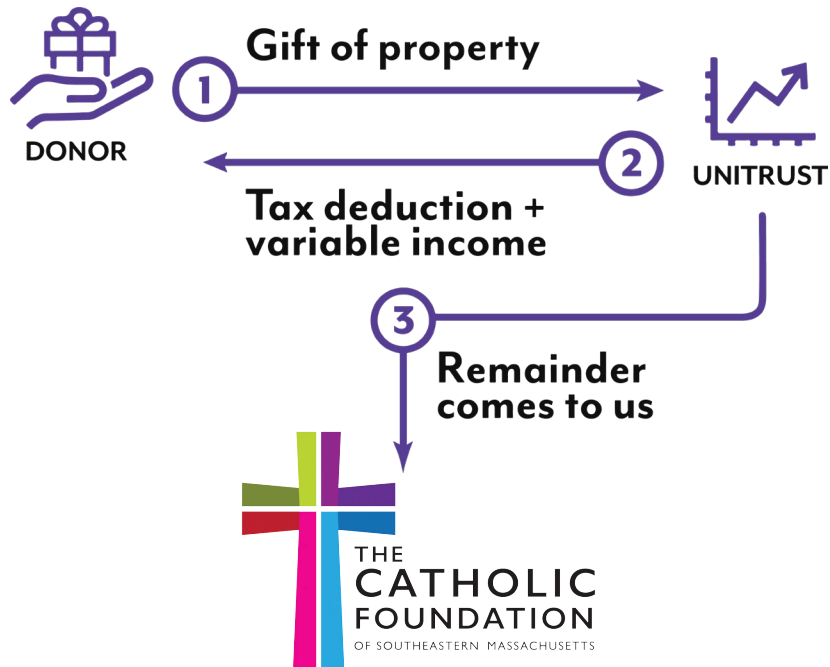




· DIOCESE OF FALL RIVER ·  
INSPIRED BY THE SOUL OF CHRIST TO LEAVE A LEGACY OF FAITH

# CHARITABLE REMAINDER UNITRUST

A great way to make a gift, receive payments that may increase over time, and defer, reduce or eliminate capital gains tax.



## HOW IT WORKS

- You transfer cash, securities, or other appreciated property into a trust. The required minimum for this type of gift is \$100,000.
- The trust pays a percentage of the value of its principal, which is valued annually, to you or beneficiaries you name.
- When the trust ends, the remainder passes to The Catholic Foundation to be used as you have directed.

## BENEFITS

- Receive income for life or for a term of years in return for your gift.
- Receive an immediate income tax deduction for a portion of your contribution.
- Pay no up-front capital gains tax on appreciated assets you give.
- You can make additional gifts to the trust as your circumstances allow for additional income and tax benefits.

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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