



CHARITABLE REMAINDER UNITRUST



OLIN
SOCIETY

Charitable Remainder Unitrust (CRT)

A Powerful Tool for Philanthropic, Estate, and Retirement Planning

A CRT is separately invested and managed and pays a percentage of its principal, re-valued annually, to you and/or other income beneficiaries you name for life or a term of years (maximum of 20). You receive a charitable income tax deduction for a portion of the value of the assets you place in the trust. After the CRT terminates, the balance is transferred to Wesleyan University to be used as you designate. A CRT provides the most flexibility of the life income gift options. Wesleyan CRTs benefit from the investment management of some of the best asset managers in the world.

A CRT may be right for you if...

- You would like to make a significant gift (\$100,000 or greater) to Wesleyan while retaining or increasing your income.
- You hold appreciated property, such as securities, a closely-held business, real estate or partnership interests, and would like to reduce capital gains tax associated with a sale.
- You want the opportunity to make gifts during your peak earnings years to provide secure payments for retirement.
- You desire maximum flexibility in your gift, including its investments and payment percentage (5%-6% is typical.) You can also benefit other charities: Wesleyan will serve as trustee so long as the University is beneficiary of 50% or more of the remainder.

Wesleyan University does not provide legal or tax advice. We advise you to seek your own legal and tax advice in connection with gift and planning matters.

A CRT with Wesleyan serving as trustee provides generous tax benefits in your peak earnings years, is invested in tax-free institutional grade mutual funds run by some of the world's best money managers, and provides regular, tax-favored payments in your retirement years. When the trust concludes, you leave an enduring gift for Wesleyan!

When you establish a CRT with Wesleyan, you become a member of the **Olin Society** and join over 1,500 members of this community who have made a commitment to the future of Wesleyan through a planned gift.

THIS IS NOT A CAMPAIGN. THIS IS WESLEYAN.

mywesleyanlegacy.org | plannedgiving@wesleyan.edu

MARK DAVIS '96
Senior Philanthropic Advisor &
Director of Gift Planning
860.685.3660

KATE QUIGLEY LYNCH '82, MALS '20, P'17,'19
Senior Associate Director of Gift Planning
860.685.5992

ELIZABETH RACCIO, MBA
Associate Director of Gift Planning,
Administration
860.685.5775