

# Charitable Lead Trust

*A Charitable Lead Trust enables you to transfer assets to the next generation with significant tax advantages after making a substantial contribution to the Jewish community.*



DECADES FROM NOW  
*you can be there...*  
An Endowment is Forever

## At-A-Glance

- Offsets gift and estate taxes on inter-generational transfers of assets
- Eliminates gift or estate tax on future appreciation of the transferred assets
- Permits donor to provide for a charitable cause during his/her lifetime

| *knowledge* | *guidance* | *personal service* |

## Charitable Lead Trust

*Transfer property to your children or grandchildren in the future while making a significant contribution to the Jewish community today.*



A Charitable Lead Trust at the Jewish Community Foundation of the Minneapolis Jewish Federation is an excellent way to transfer property to family members with significantly reduced gift or estate taxes. At the same time, you'll be making a valuable contribution to the Jewish community to help with critical needs now—or to support initiatives and organizations in the future.

A Charitable Lead Trust is established for a specific term by contributing an income-generating asset, often real estate. The trust pays an annual amount to the Jewish community until the end of the term.

Any gift or estate tax that might be due as a result of the transfer of the assets to the next generation is based on the value of the property at the time of contribution to the trust. These taxes are offset or eliminated by a deduction based on the annual income that will be distributed to the charity over the term of the trust. The payment rate and term of the trust are selected to minimize these taxes. At the end of the trust term, the assets are transferred to the next generation and no taxes are due as a result of any appreciation of the assets while held in the trust.

**ALL INQUIRIES ARE CONFIDENTIAL.**

*A gift today to the Jewish Community Foundation of the Minneapolis Jewish Federation will allow you to be there for your family, your community, and the Jewish people—whenever help is needed in the future.*