

Charitable Remainder Trust

Give a future gift to the **Henri Nouwen Society** that has benefits for you now.

When to Consider a Charitable Remainder Trust

A **Charitable Remainder Trust** is a good choice if you have assets such as bonds, stocks, mutual funds or real estate that you'd like to give to the **Henri Nouwen Society** in the future, but you want the income it generates to support you or your heirs.

You receive the income or continue to use the property, and the **Henri Nouwen Society** receives the principal after a specified period of time.

How You'll benefit

- You receive a tax receipt when you transfer assets to a trust that names
- the **Henri Nouwen Society** as the capital beneficiary
- You receive lifetime income for you or your heirs
- There are no probate fees and other estate costs
- The trust remains your asset until death, at which point the **Henri Nouwen Society** will receive the "remainder" of the asset in the trust
- Beneficial treatment of capital gains
- Your gift can be honoured during your lifetime

A **Charitable Remainder Trust** can provide flexibility when planning your estate, allowing you to meet your obligations to loved ones while enabling you to leave a legacy to the **Henri Nouwen Society**.

How to Establish a Charitable Remainder Trust

To establish a Charitable Remainder Trust, please complete a **Letter of Interest** and send it to:

Colette Halferty

Director of Philanthropy and Special Events | **Henri Nouwen Society**
chalferty@henrinouwen.org or call 1-866-226-2158 | 416 925 3745
95 St. Joseph Street, Suite 214, Toronto, Ontario M5S 2R9

Always Seek Financial and Legal Advice

We strongly recommend you seek professional advice to ensure that your financial goals are considered, your tax situation reviewed, and your Planned Gift is tailored to your circumstances.
