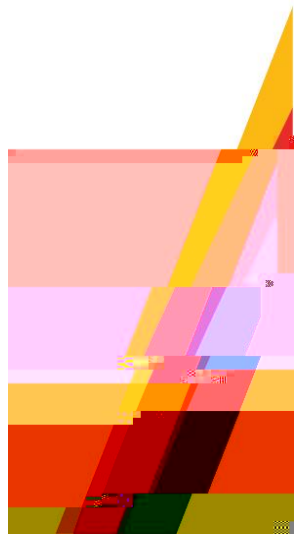


# Ways to Give

Univ

**Charitable Remainder Trust:** A future gift that gives you income now.

**Overview:**



# Charitable Remainder Trust, continued

## Benefits to You:

As the trust is irrevocable, you receive an immediate tax receipt for the present net value of the remainder interest.

You receive an annual income from the assets in the trust. Depending on the structure of the trust, income payments may be made annually, bi-annually or monthly.

Irrevocable trust assets are not included in the value of your estate, and therefore not subject to probate fees or estate income taxes.

A trust provides privacy and professional management by appointed trustees and is less susceptible to challenge than a gift by bequest.

The trust agreement can be kept private, unlike a Will, which may become a public document upon the don

*Our goal is to ensure your legacy is managed and administered according to your wishes. We can work closely with you and your advisors to capture the true spirit and intent of your donations. The University of Victoria does not provide legal advice. Your legacy is managed and administered by the University of Victoria.*

