

## Charitable Trust Services

Individuals create charitable trusts as a way of fulfilling philanthropic goals. A person can create a charitable trust during his or her lifetime, or create one under a will or trust document that takes effect at death.

Charitable trusts are usually irrevocable and designed to comply with tax laws to take advantage of various charitable tax deductions and credits. A charitable trust might continue to exist many years after the donor’s death, so that the charity receives ongoing support in the donor’s name for years to come. Many donors prefer this to a one-time, lump-sum donation.

Some of the most popular types of charitable trusts include charitable remainder trusts (CRTs) and charitable lead trusts (CLTs). CRTs provide an income stream to the donor and/or family members, with the remaining assets going to the charity after a period of time. CLTs provide a current stream of income to the charity for a period, with the remaining assets passing back to the donor or other beneficiaries at the trust’s termination. Consult your tax planning professional for information or additional features, benefits, and limitations.

As trustee of a charitable trust, Stifel Trust provides these services:

Administration of the Trust According to Its Terms	Prudent Management of Trust Assets	Safekeeping of Assets
Collection of Dividends, Interest, and Other Income	Efficient Cash Management	Calculation of “Unitrust” or “Annuity Trust” Payment Amounts
Payments to Beneficiaries	Preparation of the Trust’s Income Tax Return	Tax Information for Beneficiaries
Proxy Voting	Monthly Statements	

► For more information on charitable trust services, please contact your Stifel Financial Advisor.

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