

Charitable Remainder Trusts

offer
income for life
and
charitable donations
from your estate

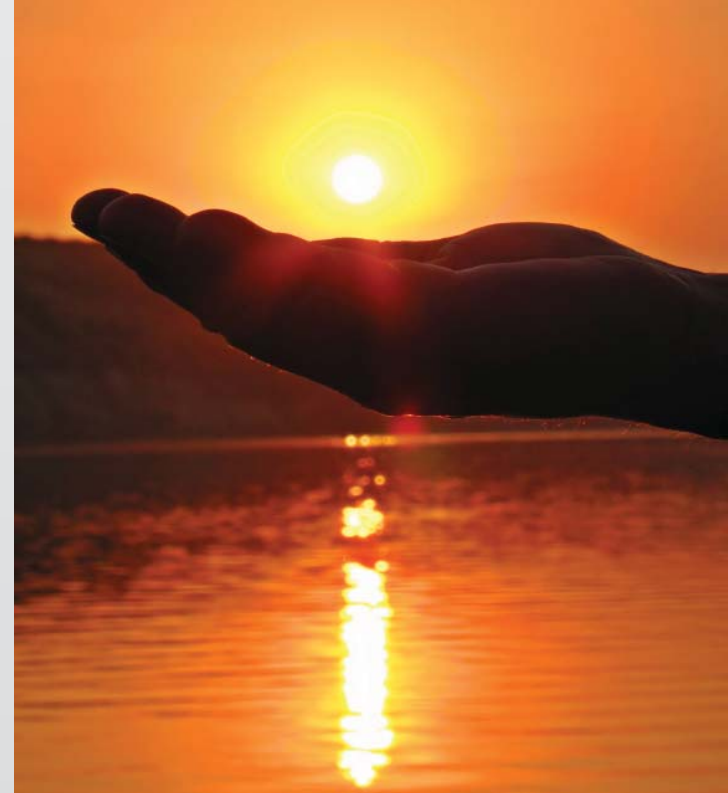
Charitable Lead Trusts

offer
immediate income
to your chosen charity
and
a reduction of your
taxable estate

**Santa Fe Trust
Charitable Remainder Trusts
and
Charitable Lead Trusts**



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**Charitable Remainder
and Charitable Lead
Trust Services**



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Why Choose Santa Fe Trust as your Trustee?



The importance of concern for others is becoming increasingly relevant in estate planning. Earthquakes volcanoes, tsunamis and other natural disasters have brought attention to the pressing problems in the World. Charitable Remainder Trusts offer a means of ensuring you of income during your life and proper use of your designated estate assets when you no longer need them.

Despite the hardships faced by many in places around the world and here at home, charitable giving declined by 5.7% from 2007 through 2009 and the stock market slide reduced endowments by as much as 40%. Among the hardest hit have been public charities that meet basic needs like food banks, homeless shelters and childrens' homes.

Our charities need your help, not only with annual cash contributions but also with longer term gifts of appreciated property that will help to rebuild their depleted endowments.

Gifts of your estate assets in a **"charitable remainder unitrust"** is a mutually beneficial, endowment building gift. You benefit beyond experiencing the joy of giving. With the high probability of considerable tax increases, you can receive tax deductions for a part of your trust contributions. No federal capital gains

taxes will be payable upon the trust's sale of any appreciated property you contribute, such as securities or unencumbered real estate. You or your designated beneficiaries can receive a lifetime or term certain income from the trust with payment amounts of at least 5% annually. Additional contributions generate additional tax deductions. When the trust terminates, your chosen charities receive the remaining assets to spend as you direct, and your estate may receive a federal estate tax charitable deduction equal to the value of the property passing to your charities.



Placing cash, securities or other property aside in a **"charitable lead trust"** can help mitigate your favorite charities' current cash flow problems by providing them with an immediate annuity that will last for the trust's term. You benefit beyond the joy of giving because the annuity payments and trust term can be planned to reduce or eliminate the transfer taxes due when the assets remaining in your trust pass to your heirs upon its termination. Any trust asset appreciation will be outside your estate and will pass tax-free to your heirs. You will qualify for a gift tax deduction for the present value of the annuity payments to charity

and your available estate tax credit can be used to further reduce transfer taxes.

Both types of Charitable Trusts produce good outcomes for altruistic people who are interested in reducing their tax exposure and using dollars that would otherwise be taxed to benefit their favorite charities and heirs. Call us to discuss how you might benefit from using a charitable remainder or lead trust.



Santa Fe Trust, Inc. is the largest independent trust company in New Mexico with a unique business model and nationwide clientele. We can engage your qualified financial advisor to manage the assets you contribute to the trusts we administer for you. This unbundled approach enables us to provide investment management services through someone local you know and trust and a personal administrator who is concerned with your unique needs and expectations. Our charitable trust administration staff has decades of specialized experience with the design, drafting, implementation and administration of charitable trusts. When we serve as your trustee, you can know that all details of administering complex charitable trusts will be handled in a competent and timely fashion. We can serve as a full trustee, co-trustee or administrative "back office" to the trustee.

Please contact us for more information about how we can help serve you.