Investing In Your Community

Fellow Nebraskans have found that they can have mixed feelings about making a gift to their hometown. While donating assets satisfies the objective of helping your hometown, the reduction this gift makes in the size of your estate may leave a concern about the future financial security of the your family.

Combining two planning tools, a Charitable Remainder Trust with a Wealth Replacement Trust, can be an answer to this concern. These trusts will provide the following benefits:

Income Benefits:
• A lifetime income in either a fixed or variable amount for yourself or loved ones.
• The potential to increase your current income.
• Professional and independent management of the gifted assets.

Income Tax Benefits:
• An immediate charitable gift income tax deduction.
• Capital gains taxes on appreciated assets are bypassed.

Estate Tax Benefits:
• Estate taxes are reduced by removing the gifted assets from your taxable estate.

The creation of Charitable Remainder Trusts and Wealth Replacement Trusts are complex matters requiring expert counsel and careful drafting in consideration of your overall estate plan. Please contact your tax, legal, and insurance advisors for more information on this strategy and to determine if it is appropriate for you.

Wealth Replacement Trust Benefits:
• Replace assets given to benefit your hometown.
• Pass wealth outside of your taxable estate.
• Avoid probate expenses and publicity.
• Take advantage of gift tax laws.

To learn more about the benefits of a wealth replacement trust, please complete the following form.

_____ Please send a personal illustration of how a wealth replacement trust would benefit me.
• I am interested in the following trust:
  One Life____ Two Life____

  Date of Birth:
  1st Person____ 2nd Person____

• Amount: $___________

Name(s) ____________________________
Address _____________________________
City ______ State ______ Zip_________
Phone________ E-mail _____________

_____ I would like someone to contact me regarding a private and confidential visit about planning a gift from my estate.

_____ In confidence, I have already included my hometown in my will.

Questions? Contact:
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• Jeff Yost, President & CEO
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(402) 323-7332

Please Mail or Fax to:
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P.O. Box 83107
Lincoln, NE 68501-3107
Delivery Address:
317 S. 12th Street, Ste. 200
Lincoln, NE 68508-2197
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Visit www.nebcommfound.org
The Nebraska Community Foundation exists to help concerned individuals mobilize charitable giving to support the betterment of Nebraska communities and organizations. The Foundation is a nonprofit charitable corporation providing financial management, strategic development, and education/training services to communities, organizations and donors throughout Nebraska. Started in 1993, the Foundation is now providing affiliated fund status (allowing communities and organizations to achieve nonprofit charitable status without forming their own nonprofit corporation) to more than 175 communities, organizations and donors. For more information about the Nebraska Community Foundation, call 402/323-7330 or visit the website at www.nebcommfound.org.

The single most important factor in community success is the involvement of citizens in their community. Your gifts of time, talent and dollars make all the difference. Have you considered what a Wealth Replacement Trust would do for your family, your community and for you?

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The Cheyenne County Community Center
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www.cheycocenter.org