

Charitable Remainder Trust

A charitable remainder trust is a separate tax-exempt account into which you transfer your gift. Sons of the Revolution in the State of New York will serve as trustee and thus handle the investment of the trust assets as well as legal and accounting administrative matters. The Society can pay you a percentage of the trust's value as income, typically 5%. As the value of the trust changes, so too does your income. Alternatively, the trustee can pay you a fixed payment each year, based on a percentage, typically 5% of the funding amount of the trust.