

Charitable Remainder Trust

An irrevocable trust that provides income to you or another beneficiary for life or a set number of years, after which the remaining assets go to Project Harmony. It offers tax benefits, including potential income tax deductions and avoidance of immediate capital gains tax when appreciated assets are placed in the trust. It offers a way to give a significant future gift while continuing to benefit from the assets during your lifetime.

Benefits

- Receive income for life or a set number of years (for you and/or another beneficiary)
- Receive a charitable income tax deduction in the year the trust is established
- Potentially reduce or defer capital gains tax on appreciated assets used to fund the trust
- Remove the assets from your taxable estate
- Leave a lasting legacy gift to support our work after the trust term ends

How it works

With the help of an attorney or financial advisor, you transfer cash, securities, or other property into an irrevocable trust. The trust pays you (or other named beneficiaries) income for life or for a set number of years. When the trust term ends, the remaining assets pass to Project Harmony.

How to make a gift

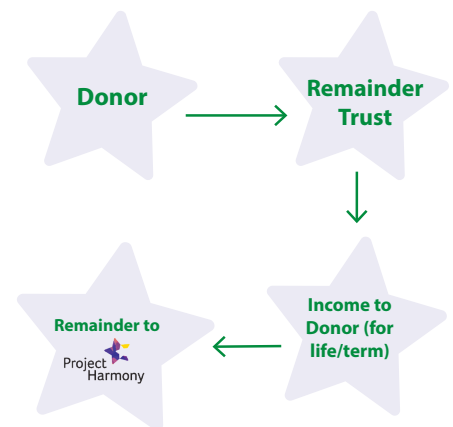
Contact your attorney and/or financial advisor. Let them know you are considering a legacy gift to benefit Project Harmony. Contact Kristie Arlt at Project Harmony to receive a Legacy Giving Intent Form, so that we may properly thank you and recognize your gift.



Join Project Harmony's Legacy Society!



Your gift ensures that Project Harmony can continue providing critical services for generations to come.



Contact

Kristie Arlt
Director of Major Gifts

Project Harmony
531.867.3092
karlt@projectharmony.com

Before making any planned gift, we encourage you to consult with your personal legal, tax, estate-planning, financial or investment advisor to ensure that any gift you are considering is appropriate for your individual circumstances. We are happy to work with you and your advisors to provide any information needed. If you or your advisor have questions, please let us know—we are here to help.

To the extent you want to identify Project Harmony as the recipient of a charitable gift or bequest, we recommend that you name "Project Harmony, Omaha, Nebraska." To eliminate confusion, you may also wish to include Project Harmony's Tax ID number 47-0789054.