

Charitable Remainder Trusts at The Signatry

Charitable remainder trusts (CRT) are a common estate planning tool. However, the challenges many donors find with using CRTs is they are required to identify the charitable beneficiaries of the trust's "remainder interest" when the trust is first established, and it can be expensive to make changes later. A solution that better supports the donor's long-term wishes is pairing a CRT with a donor advised fund (DAF) from The Signatry.

Using DAFs and CRTs Together

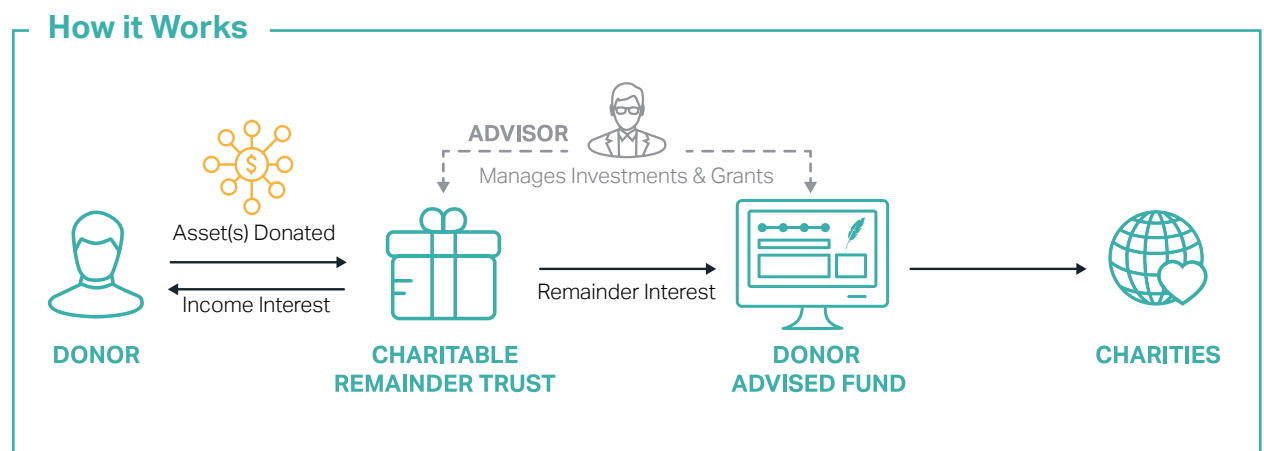
Instead of naming a specific charity, donors can designate The Signatry and a specific donor advised fund as the beneficiary. This will allow the donor to give to multiple organizations and make changes easily.

Key Benefits

- +** The donor can designate a DAF at The Signatry as the trust's beneficiary and give to multiple charities instead of designating just a single charity as a beneficiary when the trust is first established.
- +** The donor and their family may modify the charities they support through the DAF with no added expense as needs arise and passions change.
- +** The donor's family can continue their charitable legacy through the donor advised fund after the donor has passed away.
- +** If the donor wishes to include their financial advisor, the advisor can manage the assets in both the CRT and the DAF.

Example

James is establishing a charitable remainder trust and needs to identify a charitable beneficiary. James' advisor recommends that he lists his donor advised fund with The Signatry as the beneficiary of his trust, which means the fund will receive the trust's remainder interest when James passes away. Doing so gives James and his family the ability to modify the charities that will be supported and allows James' family to continue his charitable legacy through the DAF.



How to Get Started

Connect with our team by emailing info@thesignatry.com or call 913.310.0279.