

Trusts meet your Stewardship Goals and Financial Needs

Trusts are used for many reasons – protecting assets, minimizing estate taxes, ensuring financial stability for a loved one, and providing for a church or other ministry. Trusts are exceptional planning tools that can be used to attain many financial goals. A trust blends all of the benefits of professional investment management with the personal attention of a trusted advisor. By including a trust as part of your financial plan, you could ensure tax savings, asset protection, financial security, and a charitable legacy.

A charitable remainder or lead trust can serve you, your family and your stewardship commitment, as well as benefit you and the church. The charitable support can begin immediately or can follow a period when the trust provides for you or a loved one. A properly structured charitable remainder or lead trust may also provide you with income tax and estate tax benefits.

New Covenant Trust Company, N.A., a subsidiary of the Presbyterian Foundation, acts as trustee, serves as investment manager and provides trust agency services. To find out more about charitable trusts and how they may serve you, contact a Foundation Ministry Relations Office or call 800-858-6127, option #2.