

“Yes, I would like to support Sidwell Friends, but I must save for my grandchildren’s education as well.”

YOUR GIFT

A Charitable Lead Trust: It will help the School now. You create an irrevocable trust that pays annual income to Sidwell Friends for a specified number of years.

When the trust terminates, the principal will go to your grandchildren or someone else whom you designate.

YOUR PHILANTHROPY

- **Support Sidwell Friends:** The School, which must be the sole income beneficiary of the trust, will receive a gift of the trust income during the term of the trust. Because this is a current gift, you will see your philanthropy in action.
- **Create a meaningful memorial:** You will have the satisfaction of making a gift which can be used now for capital or endowment projects that are in harmony with the mission and priorities of the School. If you designate your gift for endowment, it will be invested and will provide support in perpetuity. You can make this gift **in honor or in memory** of someone you select.

YOUR BENEFITS

- **Tax benefits:** You will receive a gift or estate tax deduction at the time of the gift which will reduce the cost of the gift to your grandchildren or others

whom you designate. In addition, you will not owe an income tax on the annual income paid to the School.

- **Growth of principal:** At the end of the trust term, any appreciation in the trust principal will pass tax free to your grandchildren or others whom you designate.
- **Control of use and timetable:** You will control the timing of the trust principal distribution, for example, when college tuition will be due, and you may restrict the eventual use of the principal for a purpose you select.
- **Recognition in perpetuity:** During the term of the Charitable Lead Trust, you will be recognized annually on the School’s website, in annual reports, and at special events as a member of The Thomas and Frances Sidwell Society. Or, if you prefer, your gift can be anonymous.

YOUR OPTIONS

- **Trust term:** A charitable lead trust can last for whatever term of years you select.
- **Payment choice:** The trust will make periodic payments to Sidwell Friends for a fixed percentage of the value of the trust when it is established (an Annuity Trust) or a fixed percentage of the principal in the trust as it is revalued annually (a Unitrust).

All donors are encouraged to confer with their own financial planners or attorneys.