



Live Well, Leave A Legacy

CRT Application
Application & Request for further
CRT information and illustration

Charitable Remainder Trust Application

TRUSTEE	CO-TRUSTEE
Full Legal Name:	Full Legal Name:
SSN:	SSN:
Date of Birth:	Date of Birth:
Tax Bracket:	Tax Bracket:

Attach copy of Driver's License, Birth Certificate or state issued ID card for verification

DONOR	CO-DONOR
Donor is the same person as Trustee, if checked move to CONTACT section	Co-Donor is the same person as Co-Trustee, if checked move to CONTACT section
Full Legal Name:	Full Legal Name:
SSN:	SSN:
Relation to Trustee:	Relation to Trustee:
Legal Entity Name: (if applicable)	

Entity Type:	<input type="checkbox"/> LP <input type="checkbox"/> LLC <input type="checkbox"/> C-Corp <input type="checkbox"/> S-Corp	State:	Tax ID#:
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CONTACT INFORMATION

Address:	
City:	State: Zip:
Work Phone:	Cell Phone:
Email:	Web:

CHARITABLE REMAINDER TRUST INFORMATION

Type:	<input type="checkbox"/> CRUT (default) <input type="checkbox"/> NIMCRUT <input type="checkbox"/> FLIP CRUT	<input type="checkbox"/> Annuity Trust (CRAT) <input type="checkbox"/> Education Trust <input type="checkbox"/> Living Lead Trust <input type="checkbox"/> Testamentary Lead Trust
Percentage Rate:	Term of Years: (optional)	
Payment Schedule:	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annual <input type="checkbox"/> Annual	

GIFT INFORMATION

Asset Type:	<input type="checkbox"/> Cash <input type="checkbox"/> Securities <input type="checkbox"/> Real Estate	Estimated Value:
<input type="checkbox"/> Business:	<input type="checkbox"/> Other:	Cost Basis:
Address & Legal Description:		

CHARITABLE USE ELECTION

(default) Legacy Global Foundation Inc. _____, A Donor Advised Fund of Legacy

I hereby irrevocably transfer, assign, convey and gift all of my right, title and interest in and to the assets listed above to LEGACY GLOBAL FOUNDATION, INC. ("Legacy") as part gift and part in consideration of a Charitable Remainder Trust ("CRT") to be administered by Legacy. I understand that any conveyance to Legacy is irrevocable, and that I cannot withdraw or take back the gift. I understand that this document is an Application and not a CRT contract. Legacy reserves the right to decline any gift, and will only issue a CRT contract upon its acceptance of the Application and gift. The Information above and any illustrations of payment amounts, payment dates, or tax deductions are estimates only. The CRT payment amount will be determined by the value of the gifted assets on the date of sale (net cost of sale) and the investment gains/losses of those assets. The starting date of CRT payments will not be based on the date of the gift to Legacy, but will be determined by the date on which Legacy receives the net proceeds of sale and, where applicable, the starting date of payments to Legacy on any commercial financial instrument Legacy may purchase to secure its obligations to Trustee. The tax deduction will be calculated based on the gross value of the gift at the time of the gift as verified by independent appraisals, not the net liquidation value.

DONOR / TRUSTEE:

CO-DONOR / CO-TRUSTEE:

Signature _____ Date _____

Signature _____ Date _____