

## LEGACY GIVING

# Charitable remainder trusts



## CREATE YOUR LEGACY TODAY

by establishing a trust for McMaster University, while enjoying the interest income for life.

A charitable remainder trust is a multipurpose tool that can generate significant benefits for you and McMaster. Please turn over for more details.

## For the love of books

It was the Roaring Twenties and he studied history, coached women's basketball, and played on the football team. He managed Mac's bookstore and then went on to run his own bookstore in Hamilton.

**Paul Haeblerlin** (BA 1929) supported McMaster throughout his lifetime with generous donations in support of art history, the library, and the university's unrestricted fund. In 1994, he established a charitable remainder trust. Upon his death in 1999, the trust provided for his wife and then his daughter, and it will ultimately extend his legacy in support of the McMaster Library.



*Haeblerlin is seated on the right — at the “Esperanto Book Display” — with Vilma Eichholz (seated), Ken Price, and John Mayer de Berncastle.*

*Originally published in the Spring 1962 issue of the McMaster News, the photo is by Tom Bochsler and was provided courtesy of the William Ready Division of Archives and Research Collections at McMaster University.*

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Legal name: **McMaster University**

Charitable business number:  
**11903 5988 RR 0001**

Primary address:  
**University Advancement,  
McMaster University,  
1280 Main Street West, OJN 432  
Hamilton ON L8S 4L8**

Email: [giving@mcmaster.ca](mailto:giving@mcmaster.ca)  
Phone: **905-525-9140 ext. 21990**

### **HOW DO I DONATE WITH A CHARITABLE REMAINDER TRUST (CRT)?**

A trust is established when you irrevocably transfer assets (cash, bonds, securities, personal or real property) to McMaster University.\* This trust provides a beneficiary (you or a loved one) with interest income during life, or a period of time decided upon in advance. The remaining capital is used for the intended purpose at McMaster, upon the death of the beneficiary, or at the conclusion of the pre-determined term.

You may also fund a CRT through your will. Please contact us for further details.

### **WHAT ARE THE BENEFITS?**

- You will receive an immediate charitable tax receipt for the net present value of the remainder interest.

- You or your beneficiary (which can include your spouse) will receive a steady stream of income from the interest earned by the trust, either for life or during the pre-determined term.

- When securities are donated to fund a CRT, you no longer have the responsibilities of financial management, unless you wish to act as trustee.

- A CRT removes specific assets from your estate, which reduces probate fees and may make your estate less susceptible to being contested.

- As with any charitable donation, you may designate your gift to the area that is the most meaningful for you — and you may also provide an unrestricted donation to support the university's greatest needs.

*\*There is a minimum dollar amount required to establish a charitable remainder trust. Please contact us for the current minimum.*

This information is general in nature and does not constitute legal or financial advice. We encourage you to contact your financial and legal advisors before making your decision.