

Charitable Gift Planning

Need Assistance? Please contact Justin Gould at jgould@tmf-fdn.org or 800.933.5502



	Donor-Advised Funds	Endowment	Charitable Gift Annuity	Charitable Remainder Annuity Trust (CRAT)	Charitable Remainder Unitrust (CRUT)	Charitable Lead Annuity Trust (CLAT)	Charitable Lead Unitrust (CLUT)
Cost to Initiate	Free	Free	Free	Legal Fees	Legal Fees	Legal Fees	Legal Fees
Minimum Investment	\$10,000	\$25,000	\$5,000	\$100,000	\$100,000	\$250,000	\$250,000
Assets to Begin	Cash, Securities, Life Insurance, Real Estate	Cash, Securities, Life Insurance, Beneficiary of CGA/ CRT	Cash, Securities	Cash, Securities, Real Estate	Cash, Securities, Real Estate	Cash, Securities, Life Insurance, Real Estate	Cash, Securities, Life Insurance, Real Estate
Additions	Yes	Yes	No	No	Yes	No	Yes
How Invested	TMF Investment Notes, Balanced and/or Wespath Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio
Income	Charity	Charity	Donor	Donor	Donor	Charity	Charity
Charitable Deductions	Yes	Yes	Partial	Partial	Partial	Partial	Partial
Fees	<\$1M = 0.85% \$1M-\$3M = 0.6% >\$3M = 0.3%	<\$1M = 0.85% \$1M-\$3M = 0.6% >\$3M = 0.3%	0.50%	0.50%*	0.50%*	0.50%*	0.50%*

*Less if 50% of remainder stays at TMF | ©2022 Texas Methodist Foundation