

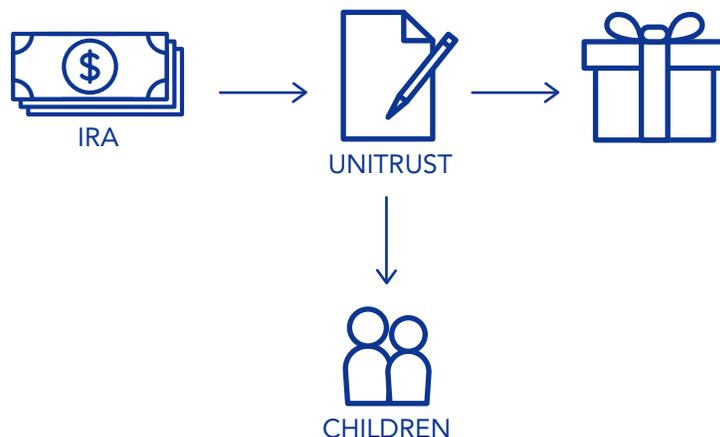
# GIVE IT TWICE TRUST - HELP FAMILY & CHARITY



LEGACY  
GIVING

If you have any questions,  
please contact **Josh DeVore** at  
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You may be looking for a way to provide your children with income while making a gift to Desert Christian Schools. The "give it twice" trust is a popular option that allows you to transfer your IRA or other asset at death to fund a term of years charitable remainder unitrust. We call this kind of unitrust a give it twice trust because you can use the trust to pay income first to your family for a number of years and then distribute the balance of the trust to charity.



## BENEFITS OF A GIVE IT TWICE TRUST

- Use the full value of your unused retirement account to provide income to your surviving spouse and to provide income to children or other loved ones for a specified period of time
- Create an estate tax deduction and savings from the charitable gift
- Support the important charitable work of Desert Christian Schools

## HOW A GIVE IT TWICE TRUST WORKS

1. We can help you and your attorney with the process of creating a charitable remainder unitrust.
2. You complete an IRA or other retirement account beneficiary designation form, naming the charitable trust as the beneficiary, and return the form to the account custodian.
3. When you pass away, the custodian will transfer your retirement account to the charitable trust.
4. The trust will pay income to your spouse, children or other individual beneficiaries for their life, term of years or life plus term of years.
5. At the conclusion of the payments, the balance of the trust will be transferred to Desert Christian Schools.