



THE SAN DIEGO FOUNDATION
THE CENTER FOR CHARITABLE GIVING

Information Needed for a Crescendo Illustration
Charitable Lead Trust

Person 1: _____
First M Last

Person 2: _____
First M Last

Payout Formula:

Unitrust Annuity Trust

Number of years for the payment: _____

Current property value: \$ _____

Cost basis of the asset: \$ _____

Current earnings: \$ _____

Estimated trust earnings rate: _____%

Trust payout rate: _____%

Additionally, it is helpful to know the following:

Will any portion of Lead Trust be transferred to grandchildren?

Yes No

Please call the Philanthropy Department at (619) 235-2300 to request an illustration.