

“The Power of CRTs”

This presentation will cover the various types of structures available for Charitable Remainder Trusts, as well as planning ideas to accomplish both charitable and personal goals for benefactors. Charitable remainder trust administration, tax consequences, assets used for funding and investment strategies will also be reviewed. Presenters Andy Tiebert and Brandon Stenseth will share examples related to these topics, including some real-life examples that they have seen through their experiences on the gift planning team at Mayo Clinic.