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Insights

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U.S. Legacy Income Trusts®

Make a contribution to our pooled income funds for a partial tax deduction, and receive a lifetime income stream for you and your beneficiaries.

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The foregoing discussion applies to the currently offered Legacy Income Trusts and the predecessor Legacy Income Trusts established by the Gift Trust in 2019, which ceased accepting new contributions on January 1, 2022. This discussion also applies to the pooled income funds established by the Gift Trust prior to the Legacy Income Trusts, which are also no longer accepting new contributions.

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