

Form CHAR004 Estates, Powers & Trusts Law	Annual Filing for Charitable Lead Trusts New York State Department of Law (Office of the Attorney General) Charities Bureau - Registration Section 28 Liberty Street New York, NY 10005 www.charitiesnys.com	2024 Open to Public Inspection
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Part A - General Information			
1. For the period beginning (mm/dd/yyyy) _____ / 2023 and ending (mm/dd/yyyy) _____			
2. Check if applicable for NYS: ☐ Address change ☐ Name change ☐ Initial filing ☐ Final filing ☐ Amended filing ☐ NY registration pending	3. Name of charitable lead trust		5. Fed. employer ID no. (EIN) (##-####-####)
	4. Number and street (or P.O. box if mail not delivered to street address) Room/suite		6. NY State registration no. (##-##-##)
	City or town, state or country and zip + 4		7. Telephone number
			8. Email address

Part B - Certification - Signature Required			
I certify under penalties of perjury that I reviewed this report, including all attachments, and to the best of our knowledge and belief, they are true, correct and complete in accordance with the laws of the State of New York applicable to this report.			
Authorized Representative	Signature	Printed Name	Title
	Date		

Part C - Fee Submitted	
Indicate the EPTL filing fee you are submitting along with this form: Total amount distributed to charity is less than \$50,000 \$25 ☐ Total amount distributed to charity is \$50,000 or more, but less than \$250,000 \$50 ☐ Total amount distributed to charity is \$250,000 or more, but less than \$1,000,000 \$100 ☐ Total amount distributed to charity is \$1,000,000 or more, but less than \$10,000,000 \$250 ☐ Total amount distributed to charity is \$10,000,000 or more, but less than \$50,000,000 \$750 ☐ Total amount distributed to charity is \$50,000,000 or more \$1500 ☐	Submit only one check or money order for the total fee, payable to "NYS Department of Law"

Part D - Attachments - All Documents Required
Attach a copy of the trust's IRS Form 5227 (Split Interest Trust Information Return)

Part E - Financial Report																																																																					
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- Mail completed form with required fee and attachments to the address at the top of this page -