

RETAINED LIFE ESTATE WITH GIFT ANNUITY

YOUR REAL ESTATE CAN HELP YOU CREATE A LIFETIME OF SECURE INCOME.

Make a gift of your primary residence, vacation home, or farm during your lifetime, and continue to enjoy your property while receiving tax benefits and income for life.



From Top:
The William Andrews Clark Memorial Library houses rare books and manuscripts, with particular strengths in English literature and history.

Robert Watson, Professor of English, teaches primarily Shakespeare and English Renaissance poetry.

BENEFITS

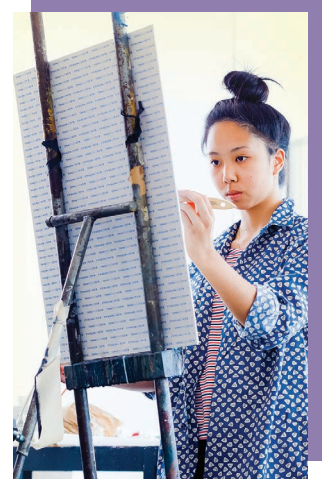
- A retained life estate with gift annuity arrangement establishes a lifetime income stream that is fixed and not subject to market fluctuations.
- You retain full use of your property during your lifetime.
- After your lifetime, the property passes to The UCLA Foundation which will sell the property and use the remainder to support UCLA as you designated

TAX ADVANTAGES

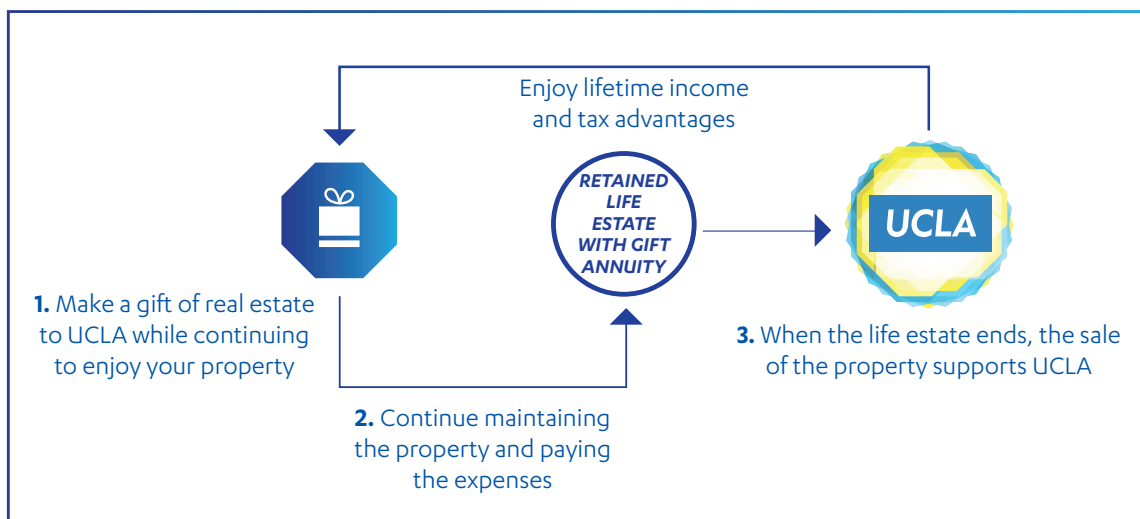
- Benefit from an immediate charitable income tax deduction based on a portion of your property's value.
- Any unused deduction may be carried forward in subsequent tax years, up to 5 additional years.
- Reduce capital gains tax on highly appreciated real estate.
- The property is removed from your taxable estate.

HOW IT WORKS

- Establish a retained life estate with gift annuity arrangement with The UCLA Foundation, in which you deed your home, vacation home or farm to UCLA while retaining full use of your property for life.
- Receive an annuity payment based on a rate that is determined by the age of the beneficiary and a portion of the property's value.
- Also receive a sizable charitable income tax deduction.
- Retain homeownership obligations, such as maintaining the property, paying taxes and insurance premiums.
- After your lifetime, the property passes to The UCLA Foundation which will sell the property and use the remainder to support UCLA.



Student at work in one of the many art studios of the UCLA School of the Arts and Architecture.



UCLA's gift planning professionals are happy to provide you and your legal and financial advisors with personalized illustrations of the benefits that a retained life estate with gift annuity offers. Any information in this publication is not intended as legal, accounting, or financial advice. Please consult with your tax, legal, and financial advisors to ascertain whether this or other gift plans are in keeping with your own tax and financial needs. Conversations with the university's gift planning team are always confidential and never imply obligation.

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