

Deferred Charitable Gift Annuity

A UCLA deferred charitable gift annuity gives you all the advantages of an immediate charitable gift annuity plus the added flexibility of timing and increasing your annuity payments to enhance your financial plans.

Plan ahead and maximize payment rates and tax benefits.



UCLA's Stein Eye Institute is a world-renowned center dedicated to the preservation of vision and the prevention of blindness.

- A portion of the annuity payments will be tax-free for a number of years.

(Continued on back page)



What Are the Benefits of a UCLA Deferred Charitable Gift Annuity?

- A deferred charitable gift annuity gives you the option of delaying payments to a future start date you select.
- Your payment rate will be higher, helping you make the most out of your gift.
- Selecting a future start date for your annuity payments means you can plan for a steady and secure income stream whenever you or a loved one will need it most—a great advantage for any retirement plan!
- This flexible approach allows you to accomplish your philanthropic goals while adding to your financial portfolio an income stream that will not fluctuate with the economy.

Tax advantages

- You can enjoy an immediate charitable income tax deduction in the year that you establish the gift.
- Any unused deduction may be carried forward in subsequent tax years, for up to 5 additional years.
- If you fund a deferred gift annuity with appreciated stock, you also may reduce your capital gains tax.



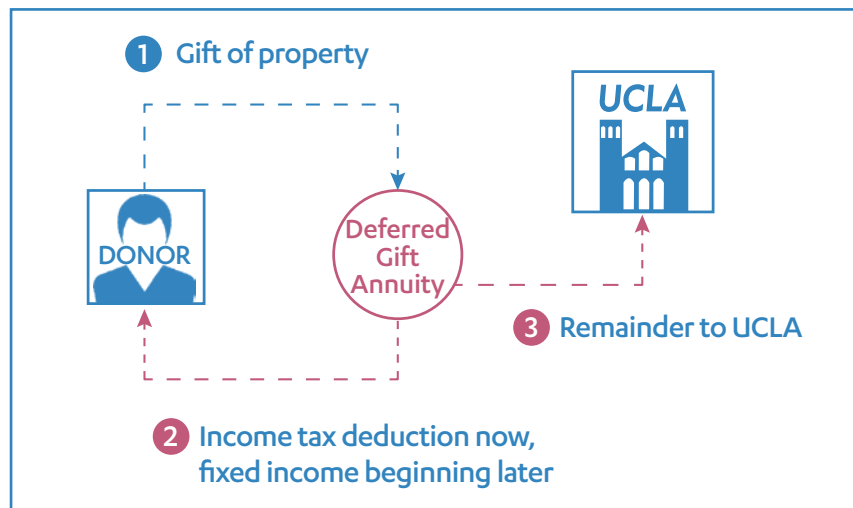
A campus landmark, Powell Library was built between 1926 and 1929. Today, the UCLA Library houses more than 11 million volumes.



The first UCLA football team took the field in 1919. Since then, the program has produced 28 first-round picks in the NFL draft and multiple major award winners.

How Does a Deferred Charitable Gift Annuity Work?

- A deferred charitable gift annuity is a contract between you and The UCLA Foundation. In exchange for a gift of cash or appreciated securities, you receive fixed payments for life.
- You decide at which future date you would like the annuity payments to start. The beneficiary (annuitant) must be at least 65 to receive payments.
- The payment rate is determined by the age of the annuitant and by the length of the deferral period. The older the annuitant and the longer the payments are deferred, the higher the rate.
- Establish a deferred annuity to provide income for one or two beneficiaries (yourself and/or loved ones).
- After the beneficiary's (annuitant's) lifetime, the remainder of your gift is distributed to UCLA for the purpose you designated.



UCLA's gift planning professionals are happy to provide you and your legal and financial advisors with personalized illustrations of the tax and income benefits that a UCLA deferred charitable gift annuity offers. Conversations with the university's gift planning team are always confidential and never imply obligation.