

Giving through Your Will or Living Trust

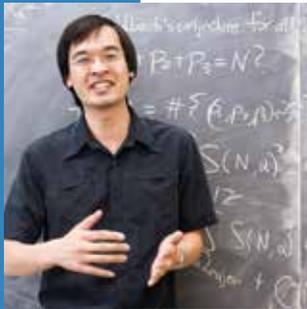
Making a gift to UCLA through your will or living trust gives you the immediate satisfaction of creating a lasting and personal

legacy that ensures UCLA's future and costs nothing now.

Your UCLA legacy will transform, enrich and save lives.

What Are the Benefits of Making a Gift (Bequest) to UCLA through Your Will or Trust?

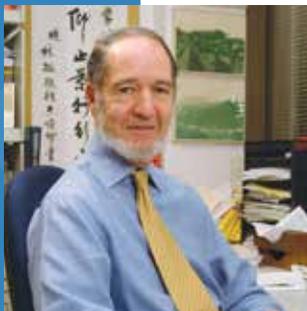
- **Your gift will have a significant impact:** Direct your bequest to any area of UCLA and create a legacy that will help change lives through education, health care, breakthroughs in research, technology and the arts.
- **A bequest is flexible:** You can use a wide range of assets to make your gift and create a highly personalized plan.
- **Your assets remain in your control:** You can modify your bequest if your situation changes.
- **A charitable bequest may minimize estate tax:** For donors who are subject to estate tax, a charitable bequest could reduce the amount of estate tax paid. In addition, some assets, such as retirement accounts, are heavily taxed when left to heirs and may also trigger an estate tax. A charitable gift, funded with these assets, bypasses taxation and gives your legacy maximum impact. *(Continued on back page)*



From top:
Terence Tao, Mathematics Professor, received a Fields Medal, the highest honor in his discipline, in 2006.



Astronomy Professor Andrea Ghez and her team discovered a massive black hole at the center of our galaxy.



Jared Diamond, Professor of Geography, is a Pulitzer Prize winner (*Guns, Germs and Steel*, 1998) and received the National Medal of Science in 1999.



Leah Platt Boustan, economic historian and Associate Professor of Economics, received a 2012 Sloan Research Fellowship.



UCLA landmark and well-known art performance venue, Royce Hall was built in 1929 and named after Josiah Royce, a California-born philosopher.

How Does a Bequest Work?

For many donors, the easiest way to make a significant gift to UCLA is through their will or living trust:

- Simply name The UCLA Foundation as a beneficiary in your estate documents, and direct your gift to any program or department—either to be used outright or to create an endowed fund that will last for generations. Alternatively, you may allow your gift to be used at the discretion of UCLA to support the area of greatest need.
- Create an addition (codicil) to your existing will or an amendment to your revocable trust.
- Choose to give a specific sum or a percentage of your estate in support of the university.
- You can also give what remains in your estate after other distributions have been made.
- Additionally, you can give specific assets, including securities, real estate (such as a residence or office building) or personal property (such as artwork, antiques, royalties, copyrights, etc.).
- Name The UCLA Foundation as a retirement plan beneficiary. To do so, you need to contact your retirement plan administrator and complete the necessary beneficiary designation forms.
- Name The UCLA Foundation as the beneficiary of your life insurance policy. Contact your policy's administrator so that you can complete the beneficiary designation form.

Should You Share Your Plans?

If you have already included UCLA in your plans (or you intend to), please let us know.

- UCLA would like to make sure your wishes are understood and that your gift will be used exactly as you intend.
- The gift planning team can provide you and your advisors with sample bequest language, if desired.
- The university would like to thank you and, if you wish, include you in UCLA's Legacy Society, a group of philanthropists who share a strong bond with UCLA and a desire to build a better tomorrow.

UCLA's gift planning professionals specialize in helping donors establish philanthropic gifts that meet individual needs and reflect personal interests. We are happy to provide you and your legal and financial advisors with more detailed information about bequests through your will or living trust. Conversations with the gift planning team are always confidential and never imply obligation.