

Retained Life Estate

Make a gift of real estate during your lifetime, and enjoy immediate and significant tax benefits while continuing to live in your home for life.

Let your real estate assets create your lasting legacy.

What Are the Benefits of a Retained Life Estate Gift Arrangement?

- This arrangement allows you to make a gift with a large philanthropic impact without disbursing any cash.
- You retain full use of your property during your lifetime.

Tax advantages

Many donors find that establishing a retained life estate arrangement provides them with substantial tax breaks:

- Receive an immediate charitable income tax deduction.
- You can claim this tax deduction up to 30% of your Adjusted Gross Income (AGI).
- Any unused deduction may be carried forward in subsequent tax years, for up to 5 additional years.
- Avoid capital gains tax on highly appreciated real estate.
- The property is removed from your taxable estate.

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UCLA students and members of the American Society of Civil Engineers work on a model of a steel bridge for a national competition.



Wind ensemble at the UCLA School of the Arts and Architecture.



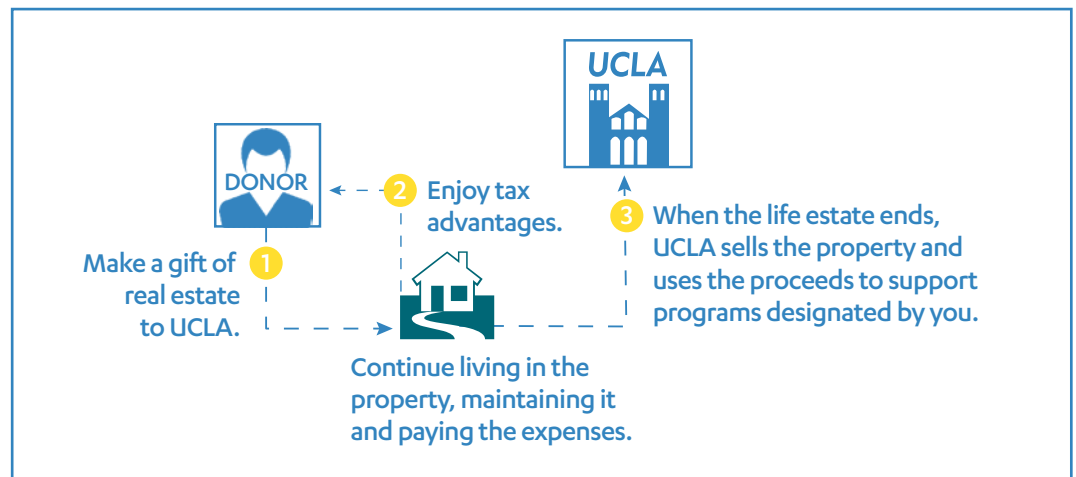
Newly minted Ph.D.s.

How Does a Retained Life Estate Work?

- Establish a retained life estate 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 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 use the proceeds of the sale to support the program or department of your choice.



Dr. Peyman Benharash, UCLA Thoracic and Cardiac Surgery, with students of the David Geffen School of Medicine.



UCLA's gift planning professionals are happy to provide you with personalized illustrations of the tax advantages that a retained life estate arrangement offers so that you can review this information with your financial and legal advisors. Conversations with the university's gift planning team are always confidential and never imply obligation.