

Retained Life Estate with Gift Annuity

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.

Your real estate can help you create a lifetime of secure income.

What Are the Benefits of a Retained Life Estate with Gift Annuity?

- 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.

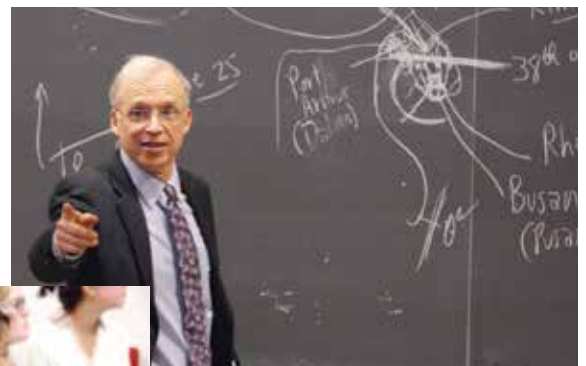
Tax advantages

- 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.

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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.



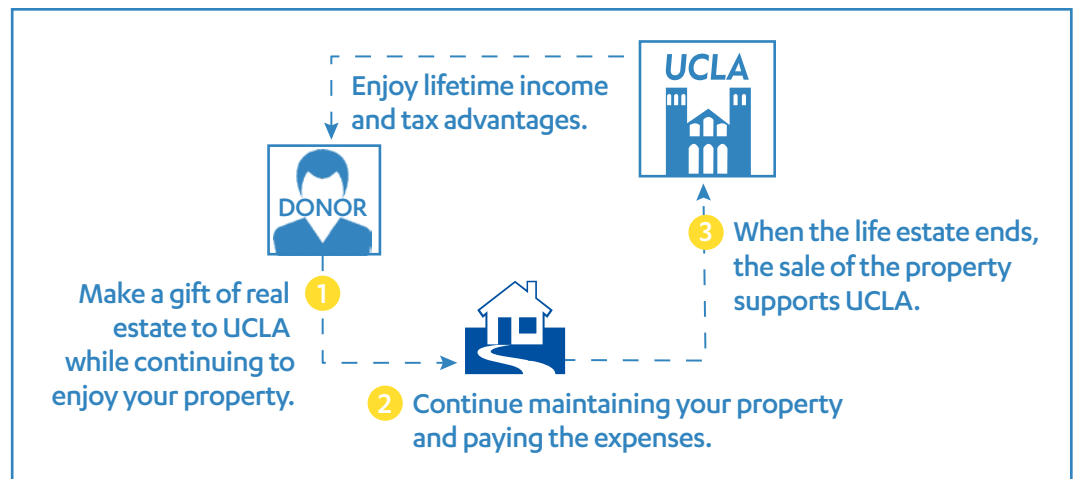
UCLA is the most applied-to university in the nation. The average GPA of admitted freshmen is 4.25.

How Does a Retained Life Estate with Gift Annuity Work?

- 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 with personalized illustrations of the tax and income advantages that a retained life estate with annuity 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.