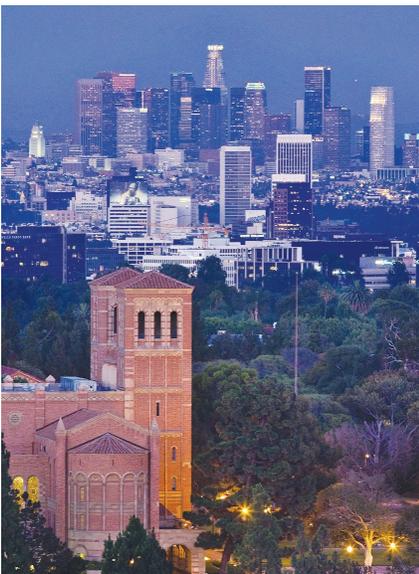


# CHARITABLE GIFT ANNUITY

**SUPPORT UCLA WITH A GIFT THAT SUPPORTS YOU.**

**A UCLA charitable gift annuity is one of the easiest ways to support your philanthropic interests. In exchange for your gift of cash or appreciated securities, you receive fixed income for life. You also benefit from an immediate charitable income tax deduction, and a significant portion of the annuity payments is tax-free.**



## **BENEFITS**

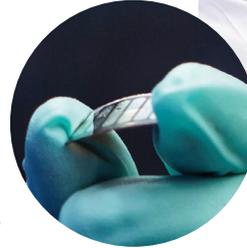
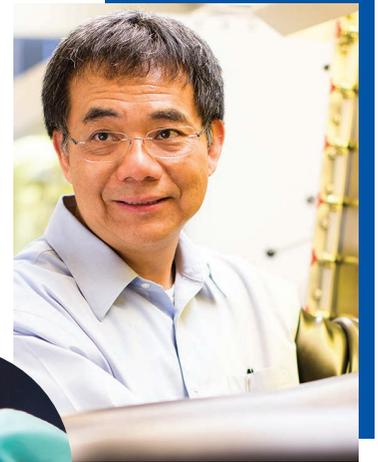
- Establish a charitable gift annuity to support any area of UCLA that interests you.
- Receive fixed, lifetime income that will not fluctuate with the economy.
- Many UCLA donors fund multiple charitable gift annuities over several years and create a secure and tax-savvy supplement to their retirement income.
- Establish an annuity to provide income for one or two annuitants, such as yourself and/or loved ones.

## **TAX ADVANTAGES**

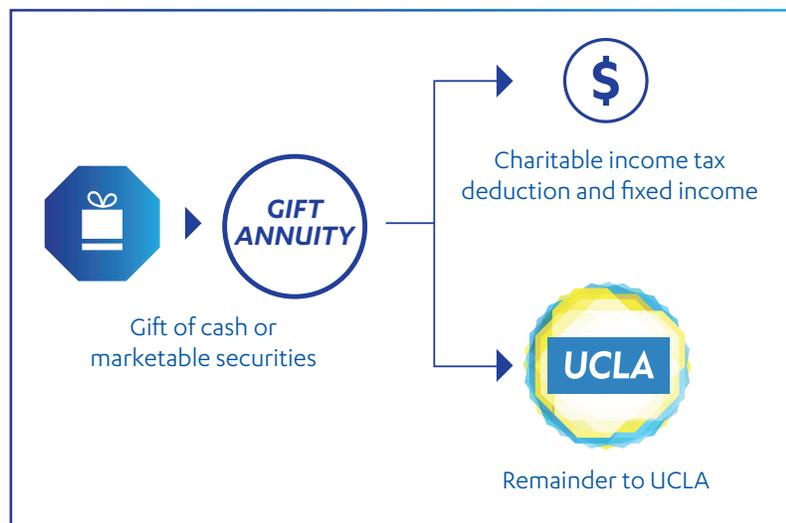
- Take advantage of significant tax savings through an immediate charitable income tax deduction.
- Any unused deduction may be carried forward in subsequent tax years, for up to 5 additional years.
- A significant portion of your annuity payments will be tax-free for a number of years.
- Fund your annuity with appreciated stock and reduce capital gains tax.

## HOW IT WORKS

- A charitable gift annuity is a simple contract between you and The UCLA Foundation.
- The minimum amount to establish an annuity is \$10,000.
- The payment rate is determined by the annuitant's (beneficiary's) age (minimum age is 65). The older the annuitant (beneficiary), the higher the payment rate.
- Choose to have your payments start immediately or at a later date. Deferring the payments increases the payment rate, and many donors take advantage of this for their retirement plans.
- Enjoy an immediate and significant charitable income tax deduction.
- A portion of your annuity payments will be tax-free for a number of years.
- After the lifetime of the annuitant (beneficiary), the balance of the annuity passes to UCLA for the purpose you designated.



Materials Science and Engineering Professor **Yang Yang** has developed see-through solar film that could be placed on windows, sunroofs, smartphone displays and other surfaces to harvest solar energy.



UCLA's gift planning professionals are happy to provide you and your legal and financial advisors with personalized illustrations of the benefits that a charitable 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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