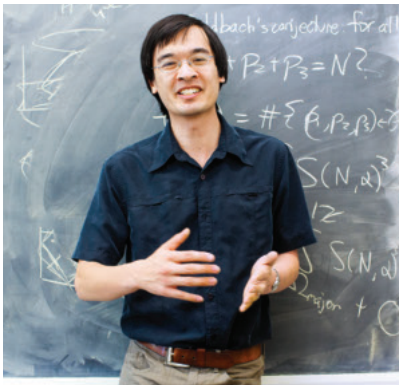


GIVING THROUGH YOUR WILL OR LIVING TRUST

YOUR UCLA LEGACY WILL TRANSFORM, ENRICH AND SAVE LIVES.

Making a gift (bequest) 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.



From top:
Terence Tao, UCLA professor of mathematics, received the Fields Medal, the highest honor in his discipline, in 2006.

Astronomy professor **Andrea Ghez** was awarded the Nobel Prize in Physics in 2020.

BENEFITS

- **Your gift will have a significant impact**
Direct your bequest to The UCLA Foundation (tax ID: 95-2250801) to benefit and support any area of UCLA and create a legacy that will help change lives through education, health care, the arts, and breakthroughs in research and technology.
- **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.

HOW IT WORKS

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 (tax ID: 95-2250801) 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 the UCLA 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 are happy to provide you and your legal and financial advisors with sample bequest language. 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.

UCLA Office of Gift Planning

800-737-UCLA (8252) • giftplanning@support.ucla.edu • legacy.ucla.edu

The UCLA Foundation tax ID: 95-2250801