

YOUR *LEGACY PLANNING* OPTIONS

	TYPE OF GIFT	ADVANTAGES	BENEFICIARY
GIFTS THAT PAY YOU INCOME	Charitable Gift Annuity	<ul style="list-style-type: none"> • Current income tax deduction • Portion of payments may be tax-free • Fixed and predictable payments 	<ul style="list-style-type: none"> • One or two annuitant beneficiaries • UCI is Future beneficiary
	Charitable Remainder Trust	<ul style="list-style-type: none"> • Current income tax deduction • Preservation of appreciated capital • Diversification of investments • Payments for life or term of years 	<ul style="list-style-type: none"> • One or more beneficiaries • UCI is future beneficiary
GIFTS THE UNIVERSITY CAN USE TODAY	Outright	<ul style="list-style-type: none"> • Current income tax deduction • See gift in operation during your lifetime 	<ul style="list-style-type: none"> • UCI is immediate beneficiary
	Tangible Personal Property		
	Bargain Sale	<ul style="list-style-type: none"> • CLT— Potential gift tax savings on transfer of assets to individual beneficiaries 	<ul style="list-style-type: none"> • CLT— You or your heirs are future beneficiaries
	Charitable Lead Trust (CLT)		
IRA Rollover Gifts	<ul style="list-style-type: none"> • For donors 70.5 years or older • Up to \$100k of tax free rollover (No deduction available) • Easy way to make annual gift or pledge payment 	<ul style="list-style-type: none"> • UCI is immediate beneficiary 	
GIFTS THAT TAKE EFFECT AFTER YOUR LIFETIME	Bequest	<ul style="list-style-type: none"> • Charitable deduction for taxable estates • Allows you to make a large gift at no immediate cost to you 	<ul style="list-style-type: none"> • UCI is future beneficiary
	Life Insurance	<ul style="list-style-type: none"> • Allows you to make a large gift at little cost to you 	<ul style="list-style-type: none"> • UCI is future beneficiary
	Retirement Plans	<ul style="list-style-type: none"> • Avoid double taxation of assets • UCI applies the full amount of plan assets to the purpose you choose 	<ul style="list-style-type: none"> • UCI is future beneficiary
	Retained Life Estate	<ul style="list-style-type: none"> • Current income tax deduction • Estate tax savings • Continued use of property for life 	<ul style="list-style-type: none"> • You retain lifetime beneficial use of property • UCI receives future rights

For information, contact:

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"I awoke this morning with devout thanksgiving for my friends, the old and the new."

— Ralph Waldo Emerson

