

CHARITABLE LEAD TRUST

Create a legacy of support for Venice Family Clinic

A charitable lead trust provides ongoing support to Venice Family Clinic for a set number of years. At the end of the trust term, remaining assets pass to your heirs.

This approach allows you to support the Clinic now while planning for the future transfer of your assets.

BENEFITS

- Provides steady annual support to Venice Family Clinic for a defined term
- Directly funds care and services during the trust period
- May provide a current charitable gift tax deduction based on future payments
- Can reduce overall transfer taxes on assets passed to heirs
- Remaining assets pass to your beneficiaries at the end of the term
- Asset growth during the trust term may transfer to heirs with reduced or no additional gift tax
- May increase the total amount you can pass to both charity and family
- UCLA or a designated trustee may administer the trust



HOW IT WORKS

- You fund a trust that makes annual payments to Venice Family Clinic
- Payments are either a fixed amount or a fixed percentage of trust assets
- You select the trust term and payout rate when the trust is created
- At the end of the term, remaining assets go to your named beneficiaries
- The trust is often funded with cash or appreciated assets expected to grow in value
- Income and capital gains may be taxable depending on structure
- UCLA or a designated trustee files annual tax returns for the trust



Venice Family Clinic can provide Charitable Lead Trusts through our affiliation with UCLA and the UCLA Office of Planned Giving.

DISCLAIMER

Information provided is not intended as legal, tax or financial advice.
Please consult your advisors to determine what is best for you.

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