

CHARITABLE REMAINDER ANNUITY TRUST

Create reliable income while making a lasting gift.

A charitable remainder annuity trust allows you to support Venice Family Clinic while receiving fixed income for life or for a set term.

BENEFITS

- Receive fixed income for life or for a term of up to 20 years.
- Payments remain stable and do not fluctuate with market performance.
- Receive predictable quarterly payments.
- Create a reliable income stream for yourself or your beneficiaries while making a future gift.



TAX ADVANTAGES

- Receive an immediate charitable income tax deduction.
- Avoid capital gains tax at the time assets are transferred to the trust, with taxes recognized over time through payments.
- Use appreciated assets in a tax-efficient way to support your philanthropic goals.
- Remove contributed assets from your taxable estate.

HOW IT WORKS

- You establish an irrevocable trust funded with cash, securities or other appreciated assets.
- The trust pays a fixed amount each year to you or your designated beneficiaries.
- The trust term may last for life or for up to 20 years.
- You may serve as trustee, appoint a trusted advisor or work with Venice Family Clinic.
- Payments remain fixed regardless of changes in the value of the trust assets.
- At the end of the trust term, the remaining assets are distributed to Venice Family Clinic for the purpose you designate.



Venice Family Clinic can provide Charitable Remainder Annuity Trust 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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