CHARITABLE REMAINDER UNITRUST

Turn appreciated assets into income and impact

A charitable remainder unitrust allows you to support Venice Family Clinic while creating variable income for yourself or beneficiaries for life or a term of years.

BENEFITS

- Provides variable income for life or a term of up to 20 years
- Payments are based on a fixed percentage of trust value and may increase over time
- Converts appreciated assets into a diversified income stream without immediate capital gains tax
- Allows additional contributions over time to increase income and future charitable impact
- Supports Venice Family Clinic while providing income for you, your family or other beneficiaries

TAX ADVANTAGES

- Receive an immediate charitable income tax deduction at the time the trust is established
- Defer capital gains tax on contributed assets, which is recognized over time as distributions are received
- Remove trust assets from your taxable estate

HOW IT WORKS

- You transfer cash, securities or other appreciated assets into an irrevocable trust
- The trust pays you or your designated beneficiaries a fixed percentage of trust value each year
- Because the trust is revalued annually, payments may rise or fall with investment performance
- You may serve as trustee or appoint The UCLA Foundation or another trustee
- At the end of the trust term, remaining assets are distributed to Venice Family Clinic for your designated purpose
- Remove the property from your taxable estate

Venice Family Clinic can provide Charitable Remainder Unitrust 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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