

DEFERRED CHARITABLE GIFT ANNUITY

Plan ahead and create a future stream of income and impact

A deferred charitable gift annuity allows you to make a gift today and begin receiving fixed payments at a future date you select. This approach can increase your payment rate while supporting Venice Family Clinic now and in the future.



BENEFITS

- Provides fixed lifetime income that begins at a future date you choose
- May offer higher payment rates due to the deferred start date
- Helps align future income with retirement or other long-term financial needs
- Provides predictable payments that are not affected by market fluctuations
- Supports Venice Family Clinic while planning for your future income needs
- You may qualify for a charitable income tax deduction based on the value of your future gift.

TAX ADVANTAGES

- Receive an immediate charitable income tax deduction in the year you establish the gift
- Carry forward any unused deduction for up to five additional tax years
- May reduce capital gains tax when funded with appreciated securities
- A portion of annuity payments may be tax-free for a period of time
- Remove the property from your taxable estate

HOW IT WORKS

- You make a gift of cash or appreciated securities to establish a contract with The UCLA Foundation supporting Venice Family Clinic
- In return, you receive fixed payments for life beginning on a future date you select
- The minimum age to begin receiving payments is 65
- The payment rate is based on age and length of deferral, with longer deferrals generally resulting in higher rates
- You may name one or two beneficiaries to receive payments
- After the beneficiary's lifetime, remaining assets support Venice Family Clinic for the purpose you designate



Venice Family Clinic can provide Deferred Charitable Annuities 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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