

DONOR ADVISED FUND

Flexible giving with Venice Family Clinic as your philanthropic partner

A donor advised fund offers a flexible way to support Venice Family Clinic and other charitable organizations over time. It allows you and your family to recommend grants now and in the future.



BENEFITS

- Build a long-term charitable legacy for you and your family
- Recommend grants to Venice Family Clinic and other charities over time
- Simplify giving by using one central charitable account
- Add contributions at any time and in any amount
- Fund with cash, securities, real estate or other appreciated assets

TAX ADVANTAGES

- Receive an immediate charitable income tax deduction for contributions
- Carry forward any unused deduction for up to five additional years
- Avoid capital gains tax on long-term appreciated assets used to fund the account
- Maintain the option for anonymous giving if desired

HOW IT WORKS

- Establish a donor advised fund through The UCLA Foundation supporting Venice Family Clinic
- Minimum initial contribution is \$250,000 with a \$50,000 minimum balance
- Receive an immediate charitable income tax deduction at the time of contribution
- Recommend grants to Venice Family Clinic and other eligible charities using a simple process
- Annual distributions are generally at least 5% of fund value
- At least 50% of annual distributions should support Venice Family Clinic and/or UCLA
- Grants may be made throughout the year, subject to minimum distribution amounts
- The fund typically concludes upon the donor's death or when the balance falls below minimum requirements
- All grant recommendations are reviewed to ensure compliance with charitable eligibility rules



Venice Family Clinic can provide Donor Advised Funds 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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