



YOUR LEGACY PLANNING OPTIONS

	TYPE OF GIFT	BENEFITS	BENEFICIARY
GIFTS THAT PAY YOU INCOME	Charitable Gift Annuity	<ul style="list-style-type: none"> • Current income tax deduction • Portion of payments may be tax free • Fixed and predictable payments 	<ul style="list-style-type: none"> • One or two annuitant beneficiaries • UCI is future residual beneficiary
	Charitable Remainder Trust	<ul style="list-style-type: none"> • Current income tax deduction • Preservation of appreciated capital • Diversification of investments • Payments for life or term of years 	<ul style="list-style-type: none"> • One or more income beneficiaries • UCI is future residual beneficiary
GIFTS THE UNIVERSITY CAN USE TODAY	Outright	<ul style="list-style-type: none"> • Current income tax deduction • See gift in operation during your lifetime 	<ul style="list-style-type: none"> • UCI is immediate beneficiary
	Charitable Lead Trust	<ul style="list-style-type: none"> • Current income stream to UCI, with potential gift tax savings to heirs in the future 	<ul style="list-style-type: none"> • UCI is immediate income beneficiary for term of years • You or your heirs are future residual beneficiaries
	IRA Rollover Gifts	<ul style="list-style-type: none"> • Up to \$100k of tax free distribution from retirement account • Easy way to make annual gift or pledge payment for individuals 70.5 years + 	<ul style="list-style-type: none"> • UCI is immediate beneficiary
GIFTS THAT TAKE EFFECT AFTER YOUR LIFETIME	Bequest	<ul style="list-style-type: none"> • Charitable deduction for taxable estates • Allows you to make a large gift at no immediate cost to you 	<ul style="list-style-type: none"> • UCI is future beneficiary
	Life Insurance	<ul style="list-style-type: none"> • Allows you to make a large gift at little cost to you 	<ul style="list-style-type: none"> • UCI is future beneficiary
	Retirement Plans	<ul style="list-style-type: none"> • Avoid double taxation of retirement assets • UCI applies the full amount of plan assets to the purpose you choose 	<ul style="list-style-type: none"> • UCI is future beneficiary
	Retained Life Estate	<ul style="list-style-type: none"> • Current income tax deduction • Potential estate tax savings 	<ul style="list-style-type: none"> • You retain lifetime beneficial use of property • UCI receives future rights to property

“Education is not filling a bucket, but lighting a fire.”

- William Butler Yeats

