

Planning Your Gift

We'll help you create a gift plan that meets your personal goals

GIFT TYPE	YOUR GOAL	BENEFITS	HOW TO GIVE IT
Bequest	Defer a gift until after your death	<ul style="list-style-type: none">- Lifetime control of your estate- Estate tax exemption- Provide for heirs while supporting UC Davis	Name UC Davis Foundation in your will
Living trust	Make a gift while preserving estate for your heirs	<ul style="list-style-type: none">- Control of trust during your lifetime- Estate-tax savings	Name UC Davis Foundation as living trust beneficiary
Charitable remainder annuity trust	Secure a fixed income during your lifetime	<ul style="list-style-type: none">- Immediate income-tax deduction- Lifetime fixed income- No capital gains tax- Possible estate tax savings	Create a trust that pays you a fixed amount annually
Charitable remainder unitrust	Protect against long-term effects of inflation	<ul style="list-style-type: none">- Immediate income-tax deduction- Lifetime variable income- No capital gains tax- Possible estate tax savings	Create a trust that pays you a percentage of its assets
Charitable gift annuity	Receive fixed annual payments	<ul style="list-style-type: none">- Immediate income-tax deduction- Fixed annual payments for life- Future tax savings	Form a contract in which you receive fixed annual payments
Charitable lead trust	Reduce taxes on assets left to heirs	<ul style="list-style-type: none">- Decrease size of taxable estate- Avoid large gift taxes- Support UC Davis while preserving trust for heirs	Create a trust that pays UC Davis Foundation yearly, then passes assets to heirs
Life insurance gift	Make a significant gift without a large cash outlay	<ul style="list-style-type: none">- Current income tax deduction- Possible future tax savings	Name UC Davis Foundation as your policy beneficiary
Retirement plan gift	Avoid double taxation on retirement plan assets	<ul style="list-style-type: none">- Preserve plan value- Avoid income tax and possible estate tax	Name UC Davis Foundation as your plan beneficiary
Real estate gift	Avoid capital gains tax on home or property sale	<ul style="list-style-type: none">- Immediate income tax deduction- Avoid capital gains tax	Donate property to UC Davis Foundation
Retained life estate	Donate your property but continue to live there	<ul style="list-style-type: none">- Income tax deduction- Continued use of home	Live in your home and give ownership to UC Davis after your death

Please contact us for more information:

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