



PLANNING YOUR GIFT

At University of California, Riverside



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Planned Gift (noun): Any major gift, made in lifetime or at death, as part of a donor’s overall financial and/or estate planning. Planned giving is also referred to as legacy giving or gift planning.

IMPACT THE FUTURE

With a planned gift to the University of California, Riverside, you can truly impact the future of this great university. Planned gifts to UCR enrich our ability to shape the lives of future generations of leaders and provide a robust teaching and learning experience. They help the university fund scholarships, research, faculty support, athletics, libraries, the botanic gardens, and the list goes on. There has never been a time in UCR's history when an investment had such profound potential to impact the future of California.

Meeting your goals is the mission of the UCR Planned Giving team. We assist UCR alumni and friends like you in creating gift plans to facilitate your personal and philanthropic goals. We can also help you maximize your support to UCR with various giving vehicles that may enable you to receive significant tax and financial benefits at the same time.

Our team will confidentially assist you and your advisors in determining which giving options will best suit your financial situation, family needs, and charitable interests. We'll help by providing suggested bequest (will or trust) language, drafting gift agreements, and anything else you might need. In short, we are here to serve you every step of the way.

Smart Charitable Planning

When planned the right way, you can ensure your estate and other financial plans accomplish your goals. Smart charitable planning will help you:

- » Ensure your financial future and security.
- » Find ways to reduce your estate and/or income taxes.
- » Accomplish your financial goals for yourself, your family, and the charities that are important to you.
- » Determine who will make your important decisions if you become incapacitated.
- » Plan ahead for the transfer of your assets after passing.

Perhaps you are considering including the University of California, Riverside in your estate plan to continue the impact of your annual gifts in perpetuity or you wish to make a special gift not possible during your lifetime. One of the quickest and most popular methods for accomplishing this is through the gift of a bequest, given through your will or living trust, or as a beneficiary designation through your life insurance, retirement plan, or other method.

There are a variety of additional giving options that can help you accomplish your goals through smart charitable planning, and we'll introduce them to you in this brochure.

WHAT CAN I GIVE?

Planned gifts to UCR offer creative and flexible ways to support the programs most important to you, while at the same time enabling you to pursue your own charitable and financial goals. Below are just a few of the giving options available to you, as well as some of the goals they can help you accomplish.

Customizable Gifts for Every Situation

Gifts That Pay You Income:

- » Charitable Gift Annuity
- » Charitable Remainder Trust
- » Deferred Gift Annuity
- » Pooled Income Fund

Gifts for UCR Today:

- » Charitable IRA Rollover
- » Charitable Lead Trust
- » Donor Advised Fund
- » Life Insurance
- » Bargain Sale
- » Gifts of Real Estate
- » Gifts of Stocks and Bonds
- » Gifts of Intellectual Property
- » Gifts of Personal Property
- » Gifts of Cash

Gifts for UCR Tomorrow:

- » Bequest (Will/Trust)
- » Charitable Gift Annuity
- » Deferred Gift Annuity
- » Charitable Remainder Trust
- » Pooled Income Fund
- » Life Estate Reserved
- » Beneficiary Designation Gifts
- » Endowments

Reaching Your Goals

YOUR GOAL	GIFT OPTIONS
Supplement your income, now or later	Charitable Gift Annuity, Charitable Remainder Trust
Make a special gift at little or no cost to yourself	Bequest, Beneficiary Designation, Life Insurance
Make a cost-effective gift while providing less-taxed assets for loved ones	Beneficiary Designation Gifts
Create security against inflation, long term	Charitable Remainder Trust
Income tax deduction for giving your home while retaining the right to stay	Retained Life Estate
Reduce gift and estate taxes on assets passing to family	Charitable Lead Trust
Give now and decide later what area of UCR and other charities to benefit	Donor Advised Fund
Make a gift from your IRA during your lifetime	Charitable IRA Rollover

Planned Gift Options – How You Benefit

GIVING METHOD	HOW IT WORKS	HOW YOU BENEFIT
Bequest	Donor makes provision in will or living trust, gives gift to UCR upon passing	<ul style="list-style-type: none"> You designate the gift's purpose Assets remain in your control during your lifetime Revocable
Charitable Gift Annuity	Donor gives asset to UCR now, UCR pays donor fixed payout for life or term; UCR receives remainder	<ul style="list-style-type: none"> Enables you to make a major gift You or your loved ones receive fixed income for life Reduce estate taxes, current income tax deduction Deferred CGA: higher payout rate and income tax deduction
Charitable Lead Trust	Donor gives assets to trust, UCR receives fixed payout for life or term; donor receives remainder	<ul style="list-style-type: none"> Pass your assets to loved ones free of gift/estate tax Reduce estate taxes, current income tax deduction
Charitable Remainder Trust (CRT)	Donor gives assets to trust, receives fixed payout for life or term; UCR receives remainder	<ul style="list-style-type: none"> You or your loved ones retain income stream from donated assets Income tax and capital gains tax savings You can make additional gifts to the trust over time
Pooled Income Fund	Multiple donors give assets to common CRT, receive tax deductions and fixed % payout for life; UCR receives remainder	<ul style="list-style-type: none"> Enables you to make a larger gift by pooling funds Produces income for retirement now Reduce estate taxes, current income tax deduction
Charitable IRA Rollover (Qualified Charitable Distribution)	Donor makes qualified charitable distribution to UCR directly from IRA(s) without any of the money being taxed	<ul style="list-style-type: none"> Your distribution is tax-free Satisfy all or part of your required minimum distribution
Donor Advised Fund	Donor contributes assets to invested fund now, receives current tax deduction, advises later where to make cash distributions	<ul style="list-style-type: none"> Make major or annual gift Immediate tax deduction Investment grows tax-free
Retained Life Estate	Donor deeds asset to UCR now while retaining the rights to use it until death; UCR receives asset after passing	<ul style="list-style-type: none"> Make a major gift that costs nothing today Retain rights to live in asset during your lifetime Completely avoids capital gains taxes
Beneficiary Designations	Donor gifts asset to UCR upon their passing	<ul style="list-style-type: none"> Make a major gift that costs nothing today Reduce income taxes for your heirs
Gifts of Real Estate	Donor gives real estate to UCR, UCR sells real estate to support programs designated by donor	<ul style="list-style-type: none"> Income tax charitable deduction No capital gains taxes at time of transfer
Life Insurance	Donor names UCR owner/beneficiary, receives tax deductions for premiums and adj. cost basis; UCR receives death benefit	<ul style="list-style-type: none"> Make a major gift that costs nothing today Current income tax deduction May reduce estate taxes
Bargain Sale	Donor sells asset to UCR for less than fair market value and receives tax deduction for gift portion	<ul style="list-style-type: none"> Enables you to make a major gift Tax deduction for gift portion Receive lump sum of cash

For a more detailed brochure highlighting any of the specific giving methods above, please call or email us at any time or visit planmygift.ucr.edu. We would love to help you determine which gift options best suit your philanthropic goals.

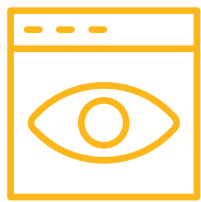
“In the end, what we all truly want is to know that we left a positive legacy.”

-KIM A. WILCOX, NINTH CHANCELLOR, UC RIVERSIDE



ESTATE PLANNING BASICS – GETTING STARTED

Begin the Process of Planning Your Estate in 8 Simple Steps:



Review the information in this brochure and at planmygift.ucr.edu



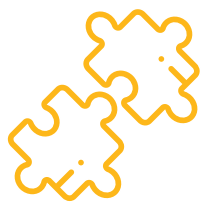
Ask yourself: "What would I like to accomplish with my money?"



Inventory your assets and debts



Consult a professional advisor



Consider all of your options



Design a plan that suits you



Finalize your plan



Review and update your plan periodically

Important Estate Planning Documents

- » Will
- » Revocable Living Trust
- » Durable Power of Attorney
- » Medical Power of Attorney
- » Health Care Directive

Assets You May Be Able to Use As Charitable Gifts

- » Cash
- » Securities
- » Land
- » Retirement Plans
- » Life Insurance
- » Rental Property or Vacation Home
- » Primary Residence
- » Antiques
- » Artwork
- » Business Interests
- » Copyrights, Royalties, Patents
- » Farm or Ranch
- » Harvested Crops
- » Livestock
- » Precious Metals
- » Valuable Collectibles
- » Mineral Rights



Contact us for a FREE copy of the UCR Wills Guide today

SAMPLE BEQUEST LANGUAGE FOR UC RIVERSIDE

In order to make a bequest, you should first speak with your attorney. Your attorney can help you include a bequest to UC Riverside in your estate plan. We have provided some basic bequest language to assist you and your attorney.

1. Specific Bequest

If you are considering making an outright gift to UC Riverside, we recommend the following language:

Bequest of a Specific Dollar Amount

“I hereby give, devise, and bequeath (a) the sum of \$ _____ or (b) _____% of my estate to UC Riverside Foundation, a non-profit organization located at 900 University Ave, Riverside, CA 92521, Federal Tax ID: 23-7433570, for UC Riverside’s general use and purpose.”

Bequest of Specific Personal Property

“I hereby give, devise, and bequeath [DESCRIPTION OF PROPERTY] to UC Riverside Foundation, a non-profit organization located at 900 University Ave, Riverside, CA 92521, Federal Tax ID: 23-7433570, for UC Riverside’s general use and purposes.”

Bequest of Specific Real Estate

“I hereby give, devise, and bequeath all of the right, title, and interest in and to the real estate located at [ADDRESS OR DESCRIPTION OF PROPERTY] to UC Riverside Foundation, a non-profit organization located at 900 University Ave, Riverside, CA 92521, Federal Tax ID: 23-7433570, for UC Riverside’s general use and purposes.”

2. Percentage Bequest

If you are considering making a bequest of a percentage of your estate to UC Riverside, we recommend the following language: *“I hereby give, devise, and bequeath _____% of my total estate, determined as of the date of my death, to UC Riverside Foundation, a non-profit organization located at 900 University Ave, Riverside, CA 92521, Federal Tax ID: 23-7433570, for UC Riverside’s general use and purpose.”*

3. Residual Bequest

“I hereby give, devise, and bequeath to UC Riverside Foundation, a non-profit organization located at 900 University Ave, Riverside, CA 92521, Federal Tax ID: 23-7433570, [ALL OR A PERCENTAGE] of the rest, residue, and remainder of my estate to be used for UC Riverside’s general use and purpose.”

4. Contingent Bequest

“If (primary beneficiary) does not survive me, then I hereby give, devise, and bequeath to UC Riverside Foundation, a non-profit organization located at 900 University Ave, Riverside, CA 92521, Federal Tax ID: 23-7433570, [DESCRIPTION OF PROPERTY] to be used for UC Riverside’s general use and purpose.”

Restricted Bequests

If you are considering a bequest but would like to ensure that your bequest will be used for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to give and meet your charitable objectives. We will also work with you and your attorney to craft language to accomplish your goals.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give UC Riverside flexibility should it no longer be possible for UC Riverside to use your gift as you originally intended:

“If, in the judgment of the Board of Directors of UC Riverside Foundation, it shall become impossible for UC Riverside to use this bequest to accomplish the specific purposes of this bequest, UC Riverside may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.”

Information for Beneficiary Designations

Wills, Revocable Living Trusts, Charitable Trusts, IRAs and Retirement Plans, Donor Advised Funds, Bank Accounts, Life Insurance, and Annuities:

Name: UC Riverside Foundation

Address: 900 University Ave, Riverside, CA 92521

Federal Tax ID: 23-7433570



FREQUENTLY ASKED QUESTIONS

How do I learn more about making a planned gift?

The UCR Planned Giving team can assist you with a variety of estate and planned giving options, including bequests, charitable gift annuities, charitable remainder trusts, IRA rollovers, gifts of life insurance, and much more. Please contact our Planned Giving team at 877.249.0181 or by email at planmygift@ucr.edu. We would love to speak with you.

How can I make a gift?

There are many ways you can make a gift to support the University of California, Riverside. From making a gift online to transferring stock, we can help you meet your philanthropic goals. Visit the three gift sections at planmygift.ucr.edu (Gifts That Pay You Income, Gifts for UCR Today, Gifts for UCR Tomorrow) to explore the various ways you can make a planned gift to UCR.

Is my gift tax deductible?

Yes, gifts are tax deductible to the extent allowable by law. The UC Riverside Foundation is a 501(c)(3) not-for-profit organization that is structurally separate from the University of California, Riverside and exists solely for UCR's benefit, serving as the preferred channel for private gifts to all areas of the university. The UC Riverside Foundation's taxpayer identification number is 23-7433570.

Who decides where my gift will be used?

You do! We find our donors enjoy uniting their personal interests with specific UCR colleges and programs. Explore the colleges and programs sections at ucr.edu/giving-support to learn more about supporting specific areas and initiatives at the University of California, Riverside.

How should I make out my check? Where do I send it?

When making a gift by check, please remember to include a contribution card or a statement indicating your gift's purpose. Gifts made by check should be payable to the UC Riverside Foundation and mailed to: UC Riverside Foundation, 900 University Avenue, Riverside, CA 92521.

What if I want to be anonymous?

If you wish for your gift to remain anonymous, please indicate your wishes at the time that you make your gift.

How do I make a gift online?

You can make a gift online using MasterCard, Visa, or American Express by visiting the UC Riverside Foundation's online giving site at givenow.ucr.edu.

How do I give a gift of stock or bonds?

You can find out more about making a gift of stock by visiting our website and clicking on "Gifts for UCR Today," then scrolling down to "Gifts of Stocks and Bonds."

Do I need to notify the UC Riverside Foundation if I have included a gift to the foundation in my will?

We want to know if you've chosen to include the University of California, Riverside in your estate plans. Those who have included UCR in their will or estate plans are recognized as members of The 1907 Society. To let us know that UCR is included in your estate plan, we invite you to visit our website and click "Let Us Know About Your Gift," or contact our Planned Giving team today so that we can assist you with all of your bequest-related needs.

What are my rights as a donor to the University of California, Riverside?

The UC Riverside Foundation adheres to the Donor Bill of Rights developed by the Council for Advancement and Support of Education, the American Association of Fundraising Counsel, the Association for Healthcare Philanthropy, and the Association of Fundraising Professionals. The purpose of the policy is to "assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support."

Will I receive a receipt for my gift?

After you make a gift online, you will receive an email from the UC Riverside Foundation confirming your gift. Approximately one to two weeks after making your gift, you will receive a receipt in the mail.

Will my company match my gift to the UC Riverside Foundation?

Many employers will match their employees' gifts to the University of California, Riverside. Some employers will even match the gifts of retired employees, spouses, parents, and even gifts from their board of directors. All matched funds will be designated to the area to which you originally contributed your gift. To find out if your company has such a program, visit the UCR Matching Gifts page at matchinggifts.com/UCR.

Can I make a gift in memory or in honor of someone?

Yes. You will have the option to select whether a gift is to be in honor of or in memory of someone when making a gift online after you've designated your gift to any established UCR fund you choose.

Does the UC Riverside Foundation share my personal information with others?

No. To respect your privacy, the UC Riverside Foundation does not sell or share any of its donor or alumni lists. Please read our UC Riverside Foundation Ethics and Conflicts of Interest Statement (located on the FAQs page of our website) for more information.

I have more questions about making a gift. Whom do I contact?

If you have additional questions, please contact us at:

University of California, Riverside – Office of Gift Planning

900 University Avenue, Riverside, CA 92521

Phone: 877.249.0181

Email: planmygift@ucr.edu

THE HISTORY OF UC RIVERSIDE

UC Riverside is a proud member of the prestigious University of California system and the Association of American Universities (AAU). Our history of high-impact innovation began with the university's earliest days as a Citrus Experiment Station and continues through today's transformative research. As we celebrate our past, we prepare bold and brilliant scientists, engineers, performers, entrepreneurs, and policy makers to tackle tomorrow's challenges.

Since our founding, UCR's evolution has mirrored the dynamic growth of Southern California. Once a small university in a small town, we are now the premier research and educational institution in the thriving Inland Southern California region.

Where all walks of life make great strides

Located on nearly 1,200 scenic acres in Inland Southern California and distinguished by more than 70 years of high-impact research, UCR is a living laboratory for the exploration of issues critical to growing communities. One of the most diverse, inclusive institutions within the prestigious 10-campus University of California system, UCR serves as an incubator of new knowledge, an engine of social mobility, and an economic powerhouse.

UCR's three colleges offer a wide range of academic and research subjects: The Marlan and Rosemary Bourns College of Engineering, with ten departments; The College of Humanities, Arts, and Social Sciences, with 22 departments; and the College of Natural and Agricultural Sciences, with 13 departments. We are home to four professional schools: School of Business, School of Education, School of Medicine, and School of Public Policy, as well as 51 research centers.

Mission

The University of California, Riverside transforms the lives of the diverse people of California, the nation, and the world through the discovery, communication, translation, application, and preservation of knowledge – thereby enriching the state's economic, social, cultural, and environmental future.





RANKINGS

Member of the Association of American Universities (AAU)

#2 among all U.S. universities for social mobility
(U.S. NEWS & WORLD REPORT)

\$2.7 billion annual impact on U.S. economy
(2022 UCR ECONOMIC IMPACT REPORT)

In top 1.3% of universities worldwide
(CENTER FOR WORLD UNIVERSITY RANKINGS)

2 Nobel Prize winners on faculty
(RICHARD SCHROCK & BARRY BARISH)

World's largest indoor air pollution research facility

#1 among public universities for Pell Grant student graduation rates
(THE CHRONICLE OF HIGHER EDUCATION)

#2 in Entomology research in the world
(CENTER FOR WORLD UNIVERSITY RANKINGS)

Two-time Pulitzer Prize winner, World Series Champion and United States Olympian among notable alumni

Top 12 public university
(FORBES "AMERICA'S BEST VALUE COLLEGES")

The most affordable and prestigious university in Southern California
(NCES 2021-22 DATA)

1907 SOCIETY

When you establish a planned gift at UCR, you are invited to join The 1907 Society. By joining others who have made provisions for UCR through their life income gifts, wills, trusts, or other planned gifts, you can take satisfaction in knowing that you are a part of an important legacy and are truly impacting the future of a great university.

The 1907 Society takes its name from the year the UC Regents established the UC Citrus Experiment Station. It was Valentine's Day, 1907, and over the next 100+ years, the ideas planted that day flourished beyond all expectation. Today, it serves as the foundation of UC Riverside, America's most transformative university.

The 1907 Society is an exceptional group of alumni, faculty, parents, staff, community leaders, and other friends whose generosity through planned gifts helps secure the future at UC Riverside.

CONTACT US

If you are interested in creating a planned gift at UCR, please contact us. The Office of Gift Planning can help you explore all options. To learn more, please call or email us, or visit our website at planmygift.ucr.edu.

UC Riverside, Office of Gift Planning

900 University Avenue, Riverside, CA 92521

877.249.0181 | planmygift@ucr.edu | planmygift.ucr.edu

This brochure is informational and educational in nature. It is not offering professional tax, legal or accounting advice. For specific advice on the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.





UC RIVERSIDE | Gift Planning

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