

GIVING THROUGH YOUR WILL OR LIVING TRUST

YOUR LEGACY WILL IMPROVE, EXTEND, AND SAVE LIVES.

Making a gift to the Jonsson Cancer Center Foundation-UCLA (JCCF) through your will or living trust gives you the immediate satisfaction of creating a lasting and personal legacy that ensures future cancer research advances and costs you nothing now.

Photography by Danielle Klebanow ©2015



BENEFITS

- Your gift will have a significant impact: Direct your bequest to highest priority cancer research, a specific type of cancer research, or a specific researcher at the UCLA Jonsson Comprehensive Cancer Center (JCCC).
- A bequest is flexible: You can use a wide range of assets to make your gift and create a highly personalized plan.
- Your assets remain in your control: You can modify your bequest if your situation changes.
- A charitable bequest may minimize estate tax: For donors who are subject to estate tax, a charitable bequest could reduce the amount of estate tax paid. In addition, some assets, such as retirement accounts, are heavily taxed when left to heirs and may also trigger an estate tax. A charitable gift, funded with these assets, bypasses taxation and gives your legacy maximum impact.



Photography by Todd Cheney - UCLA ©2011

Top: Research assistant in Dr. Kenneth Dorshkind's lab. Dr. Dorshkind studies the cells that produce antibodies and defend against viruses and tumors.

Bottom: Survivor Fern Saitowitz with Dr. Sara Hurvitz. Dr. Hurvitz is dedicated to developing and testing new targeted therapies for the treatment of breast cancer.

HOW IT WORKS

For many donors, the easiest way to make a significant gift for cancer research at UCLA is through their will or living trust:

- Simply name the Jonsson Cancer Center Foundation-UCLA (Tax ID # 95-2242757) as a beneficiary in your estate documents, and direct your gift to any type of cancer research, highest priority research, or a specific research's work. Tell us to use your gift outright or create an endowed fund (minimums apply) that will last for generations.
- Create an addition (codicil) to your existing will or an amendment to your revocable trust.
- Choose to give a specific sum or a percentage of your estate to the JCCF.
- You can also give what remains in your estate after other distributions have been made.
- Additionally, you can give specific assets, including securities, real estate (such as a residence or office building) or personal property (such as artwork, antiques, royalties, copyrights, etc.).
- Name the Jonsson Cancer Center Foundation-UCLA (Tax ID # 95-2242757) as a retirement plan beneficiary. To do so, please contact your retirement plan administrator and complete the necessary beneficiary designation forms.
- Name the Jonsson Cancer Center Foundation-UCLA (Tax ID # 95-2242757) as the beneficiary of your life insurance policy. Contact your policy's administrator so that you can complete the beneficiary designation form.

Should You Share Your Plans?

If you already have included the Jonsson Cancer Center Foundation-UCLA in your plans (or you intend to), please let us know.

- JCCF would like to make sure your wishes are understood and that your gift will be used exactly as you intend.
- We can provide you and your advisors with sample bequest language, if desired.
- JCCF would like to thank you and, if you wish, include you in the UCLA Legacy Society, a group of philanthropists who share a desire to build a better tomorrow.

JCCF's gift planning professionals are happy to provide you and your legal and financial advisors with personalized illustrations of the benefits that giving through your will and living trust offers. Any information in this publication is not intended as legal, accounting, or financial advice. Please consult with your tax, legal, and financial advisors to ascertain whether this or other gift plans are in keeping with your own tax and financial needs. Conversations with JCCF's gift planning team are always confidential and never imply obligation.

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