

Planning your gift

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

	Your Goals	Benefits	How To Give It
Bequest	Defer a gift until after your death	<ul style="list-style-type: none"> • Lifetime control of estate • May reduce estate tax 	Name UC Davis Foundation as a beneficiary in your will
Living Trust	Make your gift at your death	<ul style="list-style-type: none"> • Maintain flexibility and control of trust during life • Avoid probate delay/cost • May reduce estate tax 	Name UC Davis Foundation as living trust beneficiary
Life Insurance	Make a significant gift without a large cash outlay	<ul style="list-style-type: none"> • Can use existing policy or establish a new one • Possible estate tax savings 	Name UC Davis Foundation as policy beneficiary
Retirement Plan	Make a gift and avoid potential double taxation	<ul style="list-style-type: none"> • Use assets while living • Avoid both income tax and estate tax 	Name UC Davis Foundation as plan beneficiary
Real Estate	Avoid capital gains tax on property sale	<ul style="list-style-type: none"> • Income tax deduction • Avoid capital gains tax 	Donate property to UC Davis Foundation
Retained Life Estate	Donate property now, but continue to live there	<ul style="list-style-type: none"> • Generate large current income tax deduction • Retain use and enjoyment of home, farm or vacation property during life 	Transfer ownership to UC Davis now and retain right to use and enjoy property during your life
Charitable Gift Annuity	Receive fixed annual payments - guaranteed	<ul style="list-style-type: none"> • Income tax deduction • Fixed payments for life • Partially tax-free income 	Establish CGA contract with UC that pays you fixed income
Charitable Remainder Annuity Trust	Secure fixed income for self and/or loved one	<ul style="list-style-type: none"> • Income tax deduction • Lifetime fixed income • Avoid capital gains tax • Possible estate tax savings 	Create a trust that pays you a fixed amount annually
Charitable Remainder Unitrust	Generate income for self and/or loved one that protects against a long-term effects of inflation	<ul style="list-style-type: none"> • Income tax deduction • Lifetime income • No capital gains tax on sale • Possible estate tax savings 	Create a trust that pays you a percentage of its assets
Charitable Lead Trust	Provide income stream to UC Davis; reduce taxes on assets passing to heirs	<ul style="list-style-type: none"> • Decrease taxable estate • Reduce potential gift tax • Support UC Davis while preserving assets for heirs 	Create trust that pays UC Davis Foundation yearly, then passes assets to heirs

Need more information?

To learn about Arboretum and Public Garden initiatives, programs and gardens that could benefit from your planned giving:

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Find general information about your planned giving options:

Office of Planned Giving | (530) 754-2286 | plannedgiving@ucdavis.edu | arboretum.ucdavis.edu/planned-giving