



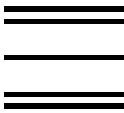
You can help ensure the future of UCSF's high-quality medical education and research by establishing a legacy gift to support the School of Medicine.



advancing health worldwide™

University of California
San Francisco

GIFT PLANNING PROGRAM
UNIVERSITY OF CALIFORNIA, SAN FRANCISCO
UCSF BOX 0248
SAN FRANCISCO, CA 94143-0248



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UCSF School of Medicine

*Leaving a legacy for
education, research
and patient care*



UNIVERSITY OF CALIFORNIA, SAN FRANCISCO



The UCSF School of Medicine strives to advance human health through a fourfold mission of education, research, patient care and public service. Consistently ranked among the nation's top medical schools, the UCSF School of Medicine earns its greatest distinction from its outstanding alumni and faculty – including Nobel laureates, National Academy of Sciences members and many other distinguished medical professionals.



There are several different ways you can provide for the School of Medicine depending on your philanthropic and financial goals.

Bequests

Many of our alumni and friends choose to support the UCSF School of Medicine by means of a bequest, either through a will or living trust.

A bequest may be a specific dollar amount, the residue of your estate or a percentage of your residuary estate. A residuary bequest is made from whatever remains after all your other gifts have been satisfied, and after all debts and other expenses have been paid.

Bequests can be large or small, but every one makes a difference.

To make a bequest in your will or trust, the following language is suggested:

“I give to the University of California, San Francisco Foundation, a California nonprofit public benefit corporation, (the sum of \$_____) (___ percent of the residue of my estate) (the residue of my estate) to be used for the benefit of the UCSF School of Medicine in such manner as the Dean shall direct.”

Beneficiary Designation

You can make a larger contribution than you might have thought possible without taking away from your current finances by naming the UCSF School of Medicine as a beneficiary of a life insurance policy, retirement plan or savings account. This gift is as easy as filling in a blank – *literally*.

Life Income Plans

You and/or a loved one can receive annual payments for life, or for a set number of years by making an irrevocable gift of cash or securities to UCSF through one of the following life income plans:

GIFT ANNUITY: This plan pays a fixed income for life. The amount of the annuity payment is based on the age of income beneficiaries at the time you make the gift. Part of each annuity payment is tax-free.

CHARITABLE REMAINDER TRUST: This is a separate trust that annually pays out an agreed-upon percentage of the value of the trust for life or a term of years. Cash, securities or real estate can be used to fund a trust, and the UCSF Foundation is available to serve as trustee.

Substantial income and estate tax deductions may be available to you when you create a Life Income Plan. If you make your gift with appreciated assets, you can also avoid paying capital gains taxes.

A gift to the **UCSF Pooled Income Fund** pays you a share of the fund's annual earnings, much like a mutual fund. You receive an income tax deduction and you can make additional contributions to the fund for as little as \$1,000.

A **charitable lead trust** is a way to provide current support for the School and transfer assets to heirs at a reduced gift tax cost.

Because there are many different options available to you, the type of gift you choose will depend upon your particular situation, as well as your philanthropic and financial objectives.

The UCSF Gift Planning staff is here to help, so please feel free to contact us by calling 415/476-1475 or e-mailing giftplanning@support.ucsf.edu. In addition, it is advisable to consult your own legal or financial advisor regarding a charitable gift.

For more information, please detach, seal and mail this reply form.

NAME _____ (please print)

ADDRESS _____

CITY _____ STATE _____ ZIP _____

I would like information on making a planned gift:

- Bequest
- Real Estate
- Gift Annuity (\$10,000 minimum)
- Pooled Income Fund (\$5,000 minimum)
- Charitable Trust (\$100,000 minimum)
- Other _____

- Please send me a calculation of the charitable deduction and expected payments for a life-income gift of \$_____.

Birth dates are required for personal calculations.

Birth date of first beneficiary:

____/____/____

Birth date of second beneficiary (if any):

____/____/____

- Please call me at: (____) _____.
- Best time to call: _____ a.m. _____ p.m.

THE HERITAGE CIRCLE is an honorary society for those who have included a gift to UCSF as part of their estate plan.

- Please send me information about becoming a member of the Heritage Circle.

Some other gift options:

You can make a gift of **real estate** using your home, farm or vacation property and continue to use and enjoy the property for the remainder of your life. This is called a retained life estate and it often provides you with a sizable current charitable income tax deduction.