Charitable Bequests
Small Effort. Big Difference.

Benefits of a Bequest
- It's simple and easy to do
- It's revocable and can be changed any time
- It's very cheap and in some cases free
- It inspires others to give in the same way
- It's personally rewarding
- It's confidential and does not require you to share your entire estate plan with us
- It may lower your federal estate tax or save your heirs on income tax

Types of Bequests
There are many ways that you can give property through your will or trust. Below are some examples:
- Specific asset: "I give my house to UCR."
- Specific dollar amount: "I give $10,000 to Javier."
- Percentage of estate: "I give 50% of my estate to Tamara."
- Residue of estate: "After all debts, administrative fees, and bequests are paid, I give what is left over to Elisa."

How To Make a Bequest
A charitable bequest is a provision written in your will or living trust by your attorney that directs gifts to be made from your estate when you pass away. Other property passes outside a will and requires you to complete a beneficiary designation form (see the reverse side for more information on beneficiary designations). A bequest is one of the easiest gifts you can make and will have a significant impact on UCR. Bequests are often among the largest gifts UCR will ever receive, and they provide a reliable stream of future support that ensures the university will continue to thrive.

Sample Bequest Language
Please contact us to request sample language that your attorney can use in writing a bequest for UCR's benefit. If you would like to establish a new named or restricted fund with your bequest, we will also work with you to create a gift agreement that details your exact wishes.

BEQUEST: You include UCR in your will or trust ·········· **WILL OR TRUST** ·········· **HEIRS** ·········· A gift that costs you nothing during your lifetime

UCR

Important Questions

Have you designated beneficiaries for your retirement plans, investment accounts, and life insurance policies? How is your real estate held? Even if you don't have a will, it's important to be able to answer these questions, because these assets may transfer automatically regardless of what your will says. We can help you make sure the proper designations are in place so that your plans are carried out according to your wishes.

Multiple Beneficiaries

Keep in mind that there are many ways you can pass on your assets outside of a will. You can designate multiple beneficiaries, taking care of your family while also benefiting the causes and organizations that are most important to you. If you would like to make a big difference at UCR, please consider making us a beneficiary in an amount or percentage of your choosing.

Beneficiary Designation Gifts

STEP 1
Donor names UCR full or partial beneficiary in designation form

- IRA
- Insurance Policy
- Investment Account
- Other

STEP 2
UCR receives the gift upon your passing

Your Automatic Estate Plan: Beneficiary Designations

Many people think of their will as their estate plan, but a will is only part of a good plan. While creating a will is important to ensuring the security of your loved ones after you are gone, some of your assets will pass automatically to your heirs if you've completed the correct paperwork.

The table below shows the kinds of assets that may pass automatically as well as the way they are most commonly transferred.

Asset	Method of Transfer
Retirement Accounts, Life Insurance	Beneficiary Designation Form
Investment, Checking, or Savings Accounts	Payable on Death or Transfer on Death
Real Estate	Joint Tenancy with Survivorship or Community Property in CA and Other States

A Simple Form

To name your beneficiaries, ask your account administrator, insurance agent or bank to send you a beneficiary designation form, fill it out, and return it. Most forms are also available online. You can name family, friends, or an organization like UCR to inherit your account. You still own the account and can continue to use it, and you can change the form at any time at no cost.

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