

Planning for Your Future

A good plan prevents accidental disinheritance and ensures that your family is protected and provided for after you are gone. The decision to create a will or trust depends on your assets, beneficiaries, and goals. This brochure will help you think through some of the planning options and determine what is best for you. If you have questions about creating a plan or need an attorney referral, please contact us. We look forward to helping you create a plan that will give you peace of mind and secure your family's future.



Impact the Future at UCR

Whether you choose to create a will or living trust, there are a number of ways you can include UCR in your plan and make an impact that will be remembered. One of the easiest ways to accomplish your charitable goals and help continue our work is through a bequest.

Your attorney can draft language making a gift to UCR of a specific asset or dollar amount, percentage of your estate, or the residue (what's left after specific bequests are made to your family). Your estate receives a charitable deduction for the gift. Another option is to create a tax deductible gift which will provide lifetime income to a family member or friend. For additional information on planning options or to receive a free referral to an attorney that has a relationship with UCR, please contact us. We look forward to helping you impact the future at this great university.

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Wills and Living Trusts

WHAT DO I NEED?



How Can We Help?

- I would like more information on wills and estate planning.
- Please refer me to a qualified estate planning attorney that has a relationship with UCR.
- I have already included UCR in my will or trust.
- Please send me your FREE wills guide.

The best way to contact me is by:

- Email Mail Telephone

Name _____

Street _____

City _____

State _____ Zip _____

Phone _____

Email _____

DOB _____

Please complete and return.

All inquiries are treated with complete confidentiality.

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

Why Create a Will?

A will is a signed and witnessed document that describes where you want your property to go. Many people first create a will in order to appoint a guardian to care for their minor children in their absence. A will is also the place where you appoint an executor to manage the administration of your estate. The benefit of a will is that it is revocable, meaning you can make changes at any time. However, there are many reasons why you might decide to create a living trust instead.

6 Reasons Why You Might Want a Living Trust

1. Preserve Privacy

A will is a public document that everyone can read, whereas a trust is private.

2. Avoid Probate

Unlike a trust, a will is subject to probate which can be time consuming and costly.

3. Property Management

Unlike a will, a living trust allows for a person of your choice to manage your property.

4. Asset Protection

A trust can be created with provisions to protect your assets from creditors.

5. Capacity Planning

A trust enables you to plan in the event you can no longer care for yourself.

6. Dependents

A trust allows you to distribute income to children and care for special needs.

