



PLANNING FORWARD

TAX-EFFICIENT GIVING IDEAS

At UCI Health, we are in the unique position to transform healthcare with our unmatched expertise, dedication to innovation, ability to train future world-class providers, and relentless pursuit to improve health and wellness. Through your strategic gift, you partner with us and ensure that those in our community and beyond have access to the best possible healthcare. In this brochure, we highlight a few tax-efficient ways to support our mission and the reason why our donors have utilized these methods of giving.



APPRECIATED SECURITIES

As a public charity, the university is able to accept a variety of assets like appreciated securities. When you make a gift of appreciated securities, you get a charitable deduction for the full fair market value of the assets if you have owned them for more than one year. You also avoid capital gains tax that you could have owed if you sold the assets.

"Our involvement with the UCI Health Gavin Herbert Eye Institute dates back to 2010 when we became founding partners in the dream to build an eye institute in Orange County. Over the years, we often opted to make payments on our multi-year pledge commitment using appreciated stock because it enabled us to maximize the impact of our philanthropic giving. Gifting appreciated securities allowed us to avoid capital gains taxes without affecting our cash flow, all while receiving a charitable deduction for the fair market value of the stock. This year marks the 10-year anniversary of the Gavin Herbert Eye Institute opening and we couldn't be prouder to be a part of that legacy."

- Marsha and Bill Link, PhDs



Tax-Efficient Giving Ideas

(continued)



IRA CHARITABLE ROLLOVER GIFTS

Do you own an IRA or other qualified retirement plan? Are you looking for a tax-wise strategy to make gifts to support our mission? An IRA charitable rollover gift will satisfy your required minimum distribution while reducing your taxable income.

"The UCI Health Gavin Herbert Eye Institute helped to save my vision which is why I give back. Using a qualified charitable distribution from my IRA is not only easy, but provides a number of tax benefits."

- Paul Arentsen



DONOR ADVISED FUNDS

If you have a donor advised fund (DAF), you can recommend distributions directly from your DAF to support our work. You may also designate UCI Health as a beneficiary of your DAF account.

"When it comes to our philanthropy with UCI Health, we are committed to encouraging community urologists to help in advancing urologic care. With the hard work and leadership of the UCI Health urology team and their mission of relieving patients suffering, our donation is the best investment to enhance that cause. Utilizing our donor advised fund has been a simple, easy method in achieving our charitable goals and a great way to support the causes that we admire at a pace that is comfortable for the both of us."

- Felix Yip, MD and Mildred Yip

If you are interested in learning about other tax-efficient ways to support our mission - such as charitable gift annuities, bequests and more - or would like additional information about the giving options listed above, please contact the [Office of Planned Giving at \(949\) 824-8134 or \[plannedgiving@uci.edu\]\(mailto:plannedgiving@uci.edu\)](mailto:plannedgiving@uci.edu).

UCI Susan & Henry Samueli
College of Health Sciences

UCI Health

These materials are intended to provide general information and should not be relied upon as tax, legal or financial advice. Please consult with your tax, legal and financial advisors to ascertain whether these gift plans are in keeping with your own tax and financial needs. Conversations with the planned giving team are always confidential and never imply obligation.

3800 West Chapman Avenue, Suite #3300, Orange, CA 92868
Phone: (949) 824-8134 | Fax: (949) 824-3890 | plannedgiving@uci.edu