



Give Your Home and Keep It Too

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Welcome

Thank you for taking the time to view this presentation. We hope you enjoy learning how a gift to our organization can help you reach your charitable and financial goals. Once you have viewed this introduction, we would welcome the chance to discuss your gift plans with you.



Your Situation

- ❖ You would like to make a significant gift to UUA
- ❖ Your home is a valuable asset, but you plan to continue living in it
- ❖ You may have never considered donating your home



A Charitable Solution

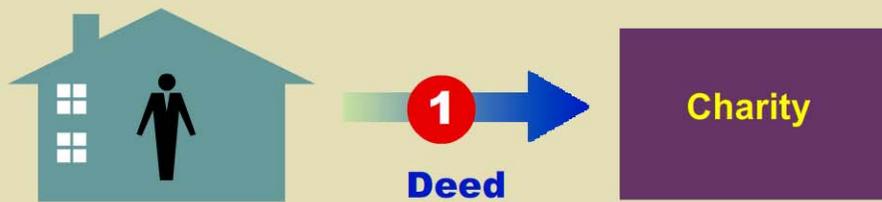
Create a gift plan called a **retained life estate**.

- ❖ Give your home to UUA
- ❖ Continue to live in your home as long as you choose
- ❖ Receive immediate tax benefit



How It Works

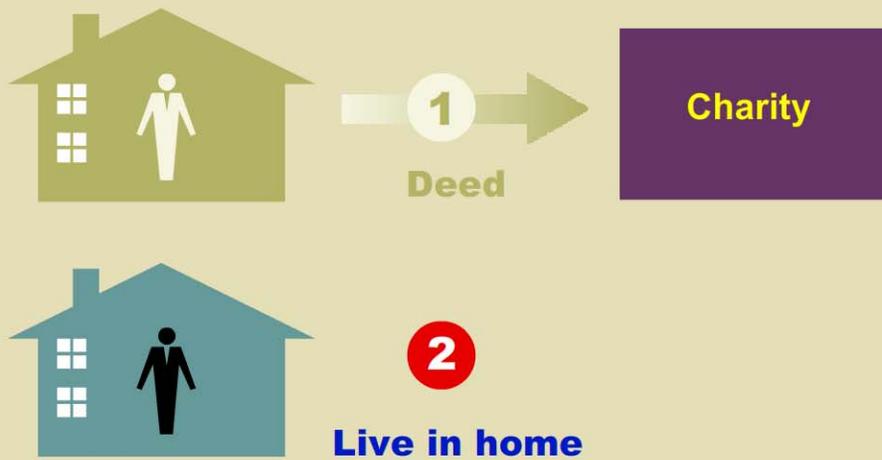
1 Transfer deed to your home to UUA:





How It Works

- 2 Continue to live in your home as long as you wish:
Remain responsible for upkeep, taxes, other expenses.

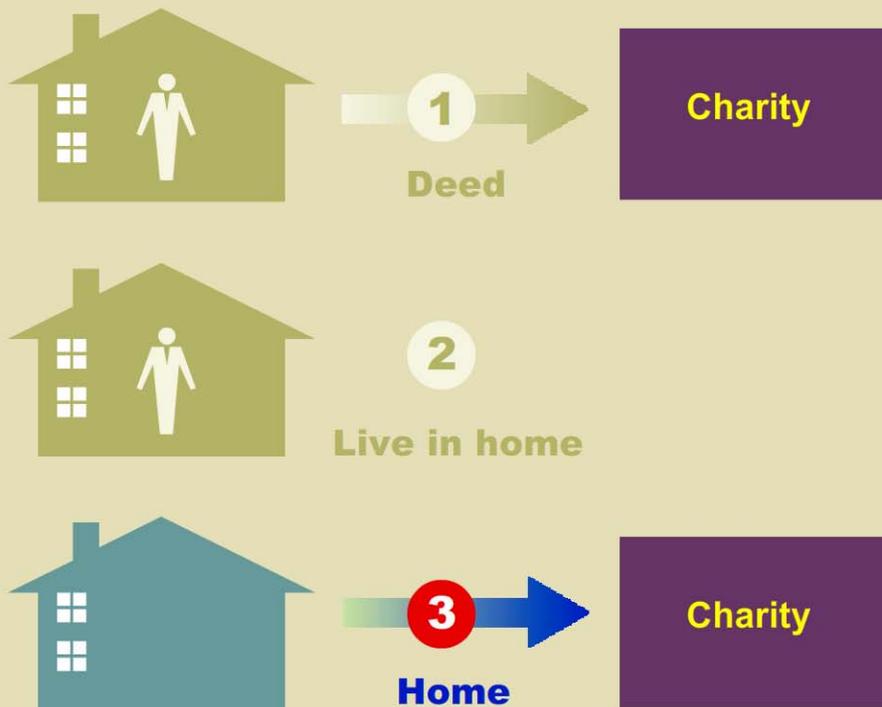




How It Works

3 UUA receives benefit:

When gift ends, typically we'll sell home and use proceeds.





Tax Benefits

- ❖ Substantial income tax deduction
- ❖ May save estate taxes and probate costs
- ❖ Can move out before plan ends, if you wish; may earn another income tax deduction



Other Property Options

Other properties you can use to create a retained life estate include:

- ❖ A second home
- ❖ A condominium or stock in a cooperative
- ❖ A boat or other structure you use as a residence
- ❖ A farm, including raw farmland



Personal Illustration

Beneficiary age(s):	75
Value of buildings:	\$200,000
Value of land:	\$0.00



Your Gift

- 1 Transfer deed to your home to UUA:
Value of home is \$200,000.





Your Gift

2 Live in your home for life:

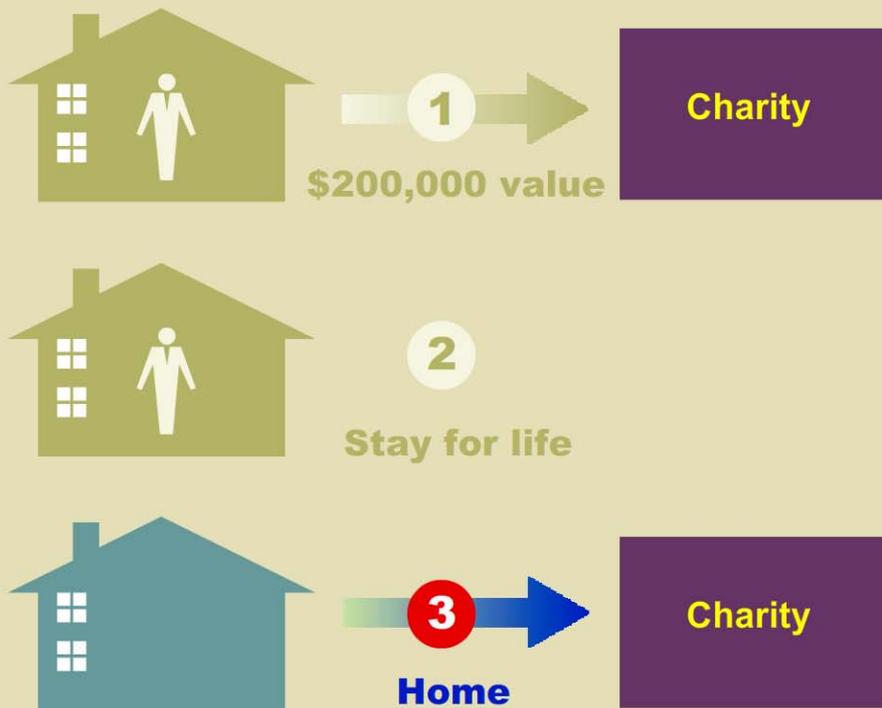
You remain responsible for upkeep, taxes, other expenses.





Your Gift

- 3 When gift term ends, your home goes to UUA:
Typically, we'll sell home and use proceeds.





Your Tax Benefits

- ❖ \$136,824 income tax deduction
- ❖ May save estate taxes and probate costs



Special Issues with Real Estate

- ❖ Need qualified appraisal of value
- ❖ UUA will conduct own review of property
- ❖ Analysis will include environmental review



Summary of Your Benefits

Beneficiary age(s):	75
Value of buildings:	\$200,000
Value of land:	\$0.00

- ❖ Continue to live in your home for life
- ❖ Receive \$136,824 income tax deduction
- ❖ May reduce estate taxes and probate costs
- ❖ Will make a generous gift to UUA, currently worth \$200,000



Thank You

Thank you very much for your interest in supporting UUA.

We welcome the chance to discuss your gift plans with you and your advisors or to provide you with a complete proposal.

Important: Please consult your own advisors before you create a retained life estate with us.

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