

Leave Your Legacy

Ensure quality health care for people in need while achieving your financial goals through a planned gift.

There are many different ways to leave a legacy gift that will make a huge impact on Venice Family Clinic.



At Venice Family Clinic, good health means great medical care — nested in the comprehensive care people need to move forward. We offer dental and vision care, a safe place for children to grow and learn, nutritious food for families, compassionate mental health care, and so much more.

Planned giving allows you to support quality health care for those in need while also fulfilling your own financial goals.

“As a member of the Board for over 28 years, I am proud to include Venice Family Clinic in my living trust. I know just how much good the Clinic does with its resources.”



—Jeff Sinaiko



We provide high quality health care to all people in need, regardless of their personal circumstances, across the Westside of Los Angeles, Inglewood, the South Bay and everywhere in between.

Our network of sites and extensive street medicine program provide comprehensive services using an innovative, integrated approach that addresses the unique combination of clinical and social factors that impact our patients’ health.

Our trusted presence in the communities we serve allows us to respond in meaningful ways to critical issues that are intertwined with health, including homelessness, trauma, mental health, food insecurity and substance use.



“Dr. Coley King, director of homeless services, cared for my son Steven, who died at just 48 years old. I have made Venice Family Clinic a beneficiary on my bank accounts, so the Clinic can continue to help people like my son.”

—Claire Owens

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If you would like further details on leaving a legacy gift or other giving opportunities, please contact:

Anna Henderson
 Director of Development,
 Individual and Corporate Philanthropy
 Office: (310) 664-7914
 Cell: (323) 270-0271
 ALHenderson@mednet.ucla.edu



venicefamilyclinic.org/legacy

Speak to your financial advisor about the many ways you can support Venice Family Clinic while likely easing your tax burden.

Why Make a Legacy Gift?

Including Venice Family Clinic in your retirement and estate plans can help you advance health care for the people who need it most while reflecting your values. Plus, legacy gifts cost nothing today and potentially provide significant tax benefits.

Make a Bequest

Designate Venice Family Clinic as a beneficiary of your estate without reducing any of your assets during your lifetime and also lowering the tax burden for loved ones.

- As a percent of your estate or as an outright gift in your will or trust
- Real estate (residence or land)
- Retirement assets (e.g., IRA, 401(k))
- Life insurance policy
- Bank and brokerage accounts



“ I have bequeathed my home to Venice Family Clinic. The Clinic has been a part of my community for 50 years, and I want to ensure the Clinic is here for another 50 years. —Cheri Schrupp ”

BEQUEST LANGUAGE

Your estate planning team can use the following language in your will or trust or to make an amendment or add a codicil to your plans.

I, NAME give INSERT DESCRIPTION OF ASSET to Venice Family Clinic Foundation, a 501(c)3 nonprofit organization Tax ID 27-3484548, 604 Rose Ave., Venice, CA 90291 to be used for UNRESTRICTED SUPPORT OR NAME OF SPECIFIC PROGRAM.*

**If circumstances arise in the future that make the purpose of the gift impossible, impractical or obsolete, then the Board of Directors of Venice Family Clinic may authorize the reallocation of the gift to a purpose as near as possible to the intent of the original bequest.*

Ways to Give a Gift Now

- **IRA Charitable Distribution** – Starting at age 70 1/2, you can give a gift of up to \$111,000 directly from your IRA to Venice Family Clinic. If you're 73 or older, it satisfies your required minimum distribution (RMD) while reducing your taxable income. Also, because it isn't included in your IRS charitable deduction limits, it allows you to maximize your giving.
- **Appreciated Securities** – If you donate securities or similar assets that you have owned for more than one year, you are entitled to a charitable income tax deduction based on their current value and you also may avoid capital gains taxes.
- **Donor Advised Funds** – This gift arrangement may be funded with a variety of assets and will provide an immediate charitable tax income deduction while allowing you and your loved ones to recommend grants.
- **Charitable Lead Trust** – Make an immediate impact and potentially enjoy tax advantages. When this trust ends, the remaining assets are distributed to your family or other loved ones.

Ways to Give a Future Gift

- **Bequest** – Designate the Clinic in your will or trust and this may reduce the tax burden for your loved ones after you are gone.
- **Retained Life Estate** – Donate a residence and continue to live there for life and receive an immediate charitable income tax deduction.
- **Charitable Remainder Trust** – Make a future gift that generates predictable income for life or for a term of years for you and a loved one. Receive an immediate charitable income tax deduction, pay no capital gains tax at the time you transfer assets to the trust, and remove the assets from your taxable estate.
- **Charitable Gift Annuity** – Establish this annuity to give a future gift and receive fixed lifetime income for you and a loved one while realizing tax benefits.

