

Arnold D. Bogart Legacy Society: Planned Charitable Giving for the USCA

Thanks you for considering a planned gift to the USCA – you will be helping continue sustainable, affordable cooperative student housing for another 75 years. The USCA is a tax-exempt 501(c)(3) nonprofit organization that offers planned giving opportunities to alumni and friends.

Alumni have contributed towards creating a sizeable scholarship endowment fund for needy co-op students, building renovation campaigns and other programs. The USCA is now working on expanding cooperative living while performing major renovations to improve all buildings, including upgrading seismic safety, expanding disabled accessibility and improving environmental sustainability.

Join the Arnold D. Bogart Legacy Society

If you have made provisions for the USCA in your will or living trust, you're eligible to join our **Arnold D. Bogart Legacy Society**, which honors the philanthropic leadership and vision of individuals who have so thoughtfully provided for the future of the Students' Co-op through a planned gift. Our Legacy Society is growing rapidly, and in joining, you are encouraging others to do the same.

There are ways to minimize taxes and support your favorite non-profit organization. By naming the USCA as a recipient in your will, living trust, retirement plan, or insurance policy, the benefits of your investment in us will increase exponentially.

Planned Giving Opportunities

We welcome and encourage alumni to plan a gift to one of our many **Scholarship Funds** to our **Building and Renovations Fund** that provides support for major projects or to our **Where it is Needed Most Fund**. Some individuals may also choose to establish a named fund for a specified purpose as long as it coincides with the mission of the USCA to provide sustainable, affordable student housing.

Scholarships and Loans

Among USCA assets are four endowed funds which generous USCA alumni have established over the years. Three are endowed by action of the USCA board of directors and one is a donor-restricted fund. The board-restricted endowed funds are the USCA Endowed Scholarship Fund established in 1996, the Pioneer Fund established in Fall 2002 and the Brooke-Harrington Memorial Scholarship Fund. The Bogie Bogart Bear Bucks-In-Aid Fund is donor-restricted.

Building Renovations

Co-op members voted to increase room and board rates in order to finalize major improvements to all the houses, allocating \$112,00 annually from its operating budget towards seismic and accessibility improvements. Alumni and community support is necessary in order to complete these urgent projects for seismic safety and disabled accessibility.

Where it is Needed Most Fund

The Where it is Needed Most Fund reflects the changing needs of the co-ops. For the next few years, for example, the stated priority of the USCA and the USCA-AA is to seismically retrofit the co-ops and the improve accessibility for students with disabilities. In the future, the funding priority may shift to scholarships or to yet another fund.

Planned Giving Options

There are a variety of ways to make planned gifts, such as naming the USCA a beneficiary in one's retirement plan or will, charitable gift annuities, charitable remainder trusts and pooled income funds. With any route you choose, there are several options to consider.

A percentage of your total estate: With this approach, your gift adjusts with changes in the size of your estate.

The residue or a percentage of the residue of your estate: After your specific gifts to loved ones have been made, you may designate that the entire residue or a percentage of the remainder shall go to one or more charitable organizations. With this approach as well, your gift adjusts with changes in the size of your estate.

A gift of a specific amount: You specify a dollar amount to be given to one or more charitable organizations. With this kind of gift, it is especially important to keep your will or trust up-to-date.

Sample bequest language for your attorney:

"I give [_____% of my estate] [the residue of my estate] [____% of the residue of my estate] [\$_____] to the University Students' Cooperative Association, a California nonprofit corporation, to where it is needed most. The USCA is currently located at 2424 Ridge Road, Berkeley, CA."

USCA Federal Tax I.D. Number: 94-09848140

Please let us know your plans...

By informing the USCA of your Legacy gift, you help us prepare for the future. And, equally important, you also give us the chance to thank you for your generosity. To notify us of your interest in Legacy Society membership, please see the contact information below.

This material does not constitute legal advice and should not be relied upon as such. Please consult your financial advisor.

For more information please contact
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