

IRA

CHARITABLE ROLLOVER

Save,
Save,
Save...

GIVE.

The IRA Charitable Rollover has definite tax advantages and allows you to use your savings in a way that means the most to you.

You saved and saved, now let us help you discover ways you can use your IRA to make an impact on our work.

Create Your Legacy

Please check off your preferences, fill in your information, and mail this form back to us. Thank you for your generous support to further the mission of our organization.

Please send me more information on IRA charitable rollover gifts.

The best way to contact me is by:

Email Mail Phone

I've already included your organization in my estate plans.

Name: _____

Street: _____

City: _____

State/Zip: _____

Phone: _____

Email: _____

(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.

momentum
legacy society

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**YOUR SAVINGS,
YOUR LEGACY.**

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IRA CHARITABLE ROLLOVER

You have saved and saved, now use your savings to create your legacy.

You have worked hard and saved for retirement and your hard work has paid off. Now use your savings to create your legacy, by making an IRA charitable rollover gift.



Avoid taxes on transfers of up to **\$50,000** from your IRA to support our cause.



May satisfy some or all of your required minimum distribution for the year.



Reduce your taxable income, even if you do not itemize deductions.



Make a gift that is not subject to the deduction limits on charitable gifts.



Use your rollover gift to make payments on an existing pledge to us.

If you are 73 or older, you now have reached that milestone where you have to take a *required minimum distribution* from your retirement account. Along with that distribution comes tax on your previously untaxed assets. So, now you might have to take income you might not need and must pay more tax this year.

But there is a way to take your required minimum distribution, skip the tax and make a meaningful gift to support our cause - the IRA Charitable Rollover. It is easy to do!

Simply instruct your retirement account custodian to send **Qualified Charitable Distribution (QCD)** (up to **\$50,000**) to us. Because our charity is tax exempt there is no tax paid on the transfer. A portion or all of your required minimum distribution is met and the money goes straight to help our work.

And don't forget matching gift opportunities! Be sure and take advantage of any employer matching gift opportunities you have available to you. Your gift can grow and make that much more of a difference!



Donna's IRA Charitable Rollover

Donna is a long-time supporter of our organization. She recently celebrated her 75th birthday. She and her late husband, Bill, saved quite a nest egg with their IRA contributions. Donna has been looking for a way to support our organization. Earlier this year, she made an IRA charitable rollover gift of \$20,000 to our endowment in Bill's memory. She plans to make similar gifts in future years.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

70 1/2
OR OLDER

DIRECT UP TO
\$50,000