

**LIVE UNITED**



United Way of the Big Bend

## HOW TO GIVE THROUGH AN IRA CHARITABLE ROLLOVER

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### IRA Charitable Rollover

You may be looking for a way to make a big difference to help further our mission. If you are 70½ or older you may also be interested in a way to lower the income and taxes from your IRA withdrawals. An IRA charitable rollover is a way you can help continue our work and benefit this year.

### Benefits of an IRA charitable rollover

- Avoid taxes on transfers of up to \$100,000 from your IRA to our organization
- Satisfy your required minimum distribution (RMD) 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
- Help further the work and mission of our organization

### How an IRA charitable rollover gift works

1. Contact your IRA plan administrator to make a gift from your IRA to us.
2. Your IRA funds will be directly transferred to our organization to help continue our important work.
3. Please note that IRA charitable rollover gifts do not qualify for a charitable deduction.
4. Please contact us if you wish for your gift to be used for a specific purpose.

### Contact us

If you have any questions about charitable gift annuities, please contact us at 414.0844. We would be happy to assist you and answer your questions.

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