

ARE YOU LOOKING FOR AN EASY WAY TO HELP THE CAUSES YOU CARE THE MOST ABOUT?

With the IRA charitable rollover, you can make a gift from your IRA account to help support the work of our organization and benefit.

WOULD YOU LIKE TO FIND OUT MORE ABOUT THE IRA ROLLOVER ?

To learn more about the benefits of making an IRA charitable rollover gift, please contact us today.



HOW CAN WE HELP?

- Please contact me with more information about the IRA Charitable Rollover.
- I have already included your organization in my will or trust.
- Please send me your FREE estate planning guide.

The best way to contact me is by:

- Email Mail Telephone

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.



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THE IRA CHARITABLE ROLLOVER IS PERMANENT!



HOW YOU CAN BENEFIT

IRA Rollover

CONGRESS HAS EXTENDED THE IRA CHARITABLE ROLLOVER AND MADE IT PERMANENT!

You can benefit from an IRA charitable rollover gift this year and in future years if...

- You wish to make a significant gift without using cash or other assets.
- You do not need all or a portion of your IRA income.
- You are paying too much in taxes and are looking to reduce your income.
- You do not itemize deductions. Because a rollover gift can reduce your income and taxes, you can still benefit from charitable giving even as a non-itemizer.
- You want to give over and above your normal giving. An IRA rollover gift does not count towards the 50% annual limitation on charitable gifts.

WHY MAKE AN IRA CHARITABLE ROLLOVER GIFT?



An IRA rollover gift is a way for you to support our cause today without impacting your checking or savings account balance.

Gifts made from your IRA (up to \$100,000 per year) are not reportable as taxable income. They also qualify for your required minimum distribution (RMD) which can lower your income and taxes.

In addition, making an IRA rollover gift may prevent you from:

- being bumped into a higher federal and/or state income tax bracket
- hitting the phaseouts on your deductions and personal exemptions
- falling into the Alternative Minimum Tax (AMT)
- incurring the Affordable Care Act (ACA) tax

WHAT IF YOU HAVE A 401(k), 403(b) OR OTHER RETIREMENT PLAN?

This gift opportunity only works for IRAs. If you own another type of qualified retirement plan, you must first make a tax-free rollover of funds into an IRA. Then you can make the gift from the IRA account to support our work.

HOW CAN I MAKE AN IRA CHARITABLE ROLLOVER GIFT?

Contact your IRA plan administrator to learn their procedure for making a rollover gift to charity. We can also provide you with a sample letter and assistance. To learn more about the IRA charitable rollover and its benefits, please contact us.