



YOUR SAVINGS, YOUR LEGACY

Benefits of Making an IRA Charitable Rollover Gift to Support **FOREVER VALUE**



Avoid taxes on transfers of up to \$100,000 from your IRA to support our cause.



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 to make payments on an existing pledge to us.

There is a way to take your required minimum distribution, skip the tax and make a meaningful gift to support our cause this year – the IRA Charitable Rollover.

It's Easy To Do!

Instruct your retirement account custodian to send any amount (up to \$100,000) to us this year. Because our charity is tax exempt there is no tax paid on the transfer. IRA Rollovers cannot be added to a Donor Advised Fund. All or a part of your required minimum distribution will be met and the money goes straight to supporting Catholic ministries and programs in our community.

Create Your Legacy With An IRA Charitable Rollover Gift

If you are 70½ or older, you can use your individual retirement account (IRA) to support the Foundation. Making an IRA charitable rollover gift to us will lower the income and taxes from your IRA required minimum distribution this year.

Please call or visit our website to learn about how you can create your legacy by making an IRA charitable rollover gift this year.

IRA ROLLOVER

70½ OR OLDER

DIRECT UP TO \$100,000



THE CATHOLIC COMMUNITY FOUNDATION OF SANTA CLARA COUNTY

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