

## How can we help?

- Please contact me with more information about the IRA Charitable Rollover
- I have already included the church ministries 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.



**Iowa United Methodist Foundation**

2301 Rittenhouse Street,  
Des Moines, IA 50321

[iumf.org](http://iumf.org) | [info@iumf.org](mailto:info@iumf.org) | 515.974.8927

## Help Your Favorite Ministries into the Future!

Consider making a charitable bequest of part or all of your IRA. This permits you to make full use of your funds during your lifetime. Your favorite ministry will benefit into the future from your gift. Your plan custodian can provide you with a designation form. Please contact us if you wish to learn more about making a bequest.



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@IUMFoundation

## Reduce Your Taxes With an IRA Gift



## Did you know...

That you can reduce your taxes by making a gift from your IRA to a church or ministry? An IRA rollover is a simple and easy way for you to use your IRA to support your favorite ministry.



## How to Make an IRA Rollover Gift to us

To make an IRA rollover gift, simply contact your custodian and request that an amount be transferred to us. Your gift could be \$1,000, \$10,000, \$50,000, or even \$100,000. Contact us to learn more about how you can redirect unneeded IRA income to your favorite mission and enjoy valuable tax savings this year.

## How it Works

### CONVERT A BURDEN TO A BENEFIT

If you are 70 and a 1/2 or older, you are likely familiar with the IRA required distribution (RMD). Each year, the IRS requires you to withdraw a certain amount from your IRA whether you need the funds or not. And you pay income tax on every distribution you take. For many IRA account holders, the taxes can be a significant and undesirable annual burden.

### MAJOR GIFT WITH MINOR EFFORT

Many people are discovering that they can make a big difference to help your church or other ministry with an IRA rollover gift. For an added benefit, consider designating our organization as a beneficiary of your IRA.

### REDUCE TAXES, INCREASE IMPACT

The IRA charitable rollover provides several benefits: it allows you to transfer up to \$100,000 from your IRA directly to a nonprofit, you pay no taxes on the amount given and your gift counts dollar-for-dollar to support important work. You can also count the gift against your required minimum distribution, which lowers your income and taxes.

## Make an IRA Rollover Gift Today!

If you have further questions about how an IRA gift can benefit you, please contact us at [info@iumf.org](mailto:info@iumf.org) or 515-974-8927. We can help you create a plan that achieves your personal and financial goals.

You can also contact us by filling out the reply card on the back, cutting it out and sending it to 2301 Rittenhouse St., Des Moines, IA, 50321.

