

# Bequests:

LET YOUR LEGACY  
REFLECT YOUR FAITH

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



If you have any questions about making a bequest, IRA rollover gift, or another type of gift, contact us at:

**info@iumf.org**

**515.974.8927**

Check out our website at:

***https://iumf.org/***

Follow IUMF on social media:

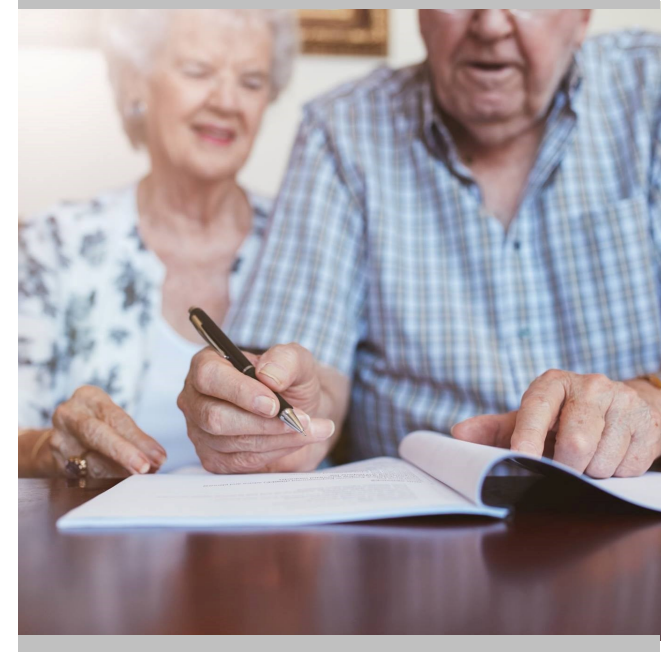
**@IUMFoundation**



REDUCE YOUR TAXES  
WITH AN

**IRA Gift**

TO YOUR CHURCH



# IRA Rollovers:

SIMPLE GIFTS WITH  
LASTING IMPACT



## HOW TO MAKE AN IRA ROLLOVER GIFT

Simply contact your custodian and request that an amount be transferred to IUMF as a charitable gift. Your gift could be any amount up to \$100,000. Contact us to learn more about how you can redirect extra 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 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, and you pay income tax on every distribution you take. For many IRA account holders, the extra tax liability can be a significant burden.

### MAJOR GIFT WITH MINOR EFFORT

Many people are discovering that they can make a big difference to help their church or other ministry with an IRA rollover gift.

### REDUCE TAXES, INCREASE IMPACT

The IRA charitable rollover provides several benefits: it allows you to transfer up to \$100,00 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 at tax time.

## MAKE AN IRA ROLLOVER GIFT TODAY!

If you have questions about how an IRA gift can benefit you, please contact the Iowa United Methodist Foundation at [info@iumf.org](mailto:info@iumf.org) or [515-974-8927](tel:515-974-8927).

We can help you create a plan that achieves your personal and financial goals.

