



Catholic Foundation of North Georgia
5871 Glenridge Dr. NE, Suite 300
Atlanta, GA 30328
404-497-9440
jgreco@cfnga.org
cfngalegacy.org



YOUR SAVINGS, YOUR LEGACY.

Benefits of Making an IRA Charitable Rollover Gift to Support Your School



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



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.

There is a way to take your required minimum distribution, skip the tax and make a meaningful gift to support a Catholic school 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 a Catholic school this year. Because your school is tax exempt there is no tax paid on the transfer. All or a part of your required minimum distribution will be met and the money goes straight to work at the school.

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 a Catholic school. Making an IRA charitable rollover gift to the school 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 CHARITABLE
ROLLOVER**

**70½
OR OLDER**

**DIRECT UP TO
\$100,000**

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.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

Copyright © 2018 Crescendo Interactive, Inc. Used by permission.