



**Congress, President
Make Permanent the
IRA Charitable Rollover**

If you are 70½ or older and have a Traditional or Roth IRA you may give up to \$100,000 to a charitable organization without being subject to income tax on the distribution. In addition, the gift satisfies all or in part the annual **Required Minimum Distribution** from the IRA.

We encourage you to consider an IRA Charitable Rollover gift to your local church or any United Methodist ministry of your choosing. You may make a direct charitable gift to fund your church's operating budget, fund a special project or establish a permanent endowment fund to benefit your church in perpetuity.

It is wise to consult your IRA custodian or financial planner to assist you. **The Wisconsin United Methodist Foundation** is available to assist you, as well. Please call us toll-free at 1-888-903-9863 or email us at wumf@wumf.org.

If you prefer to channel your IRA Charitable Rollover gift through the Foundation office to your local church or a number of United Methodist ministries, we are happy to do so. Please call the Foundation!

To Make a Charitable Rollover Gift

Please see the sample letter on the back of this page. (It requires the federal tax ID number for your church or the charity you wish to benefit. Please call your church Treasurer.)

When you have completed and signed the letter, send it to your IRA Custodian and ask them to make a direct transfer of funds from your IRA to your local church or favorite charity. Be sure that the check is made payable to the church or charity, even if it is mailed to you.

Wisconsin United Methodist Foundation
750 Windsor Street, Suite 305
Sun Prairie, WI 53590
(888) 903-9863

Date: _____
Name of IRA Custodian: _____
Address: _____
City/State/Zip: _____

Dear IRA Custodian,

In late December 2015, Congress passed and the President signed into law legislation that made permanent the ability to rollover directly from an IRA to a qualified charitable organization. As the owner of IRA account # _____ that is in the custody of your organization, I request that you transfer from that account the sum of \$ _____ to the:

Your Church or Charity Name: _____
Street Address: _____
City/State/Zip: _____
Treasury Tax ID Number: _ _ - _ _ _ _ _ _ _

It is my intention to make a Qualified Charitable Distribution (QCD) from my IRA to be sent directly to _____ at the address listed above.

It is also my intention that this distribution ___ will / ___ will not (*choose one*) fulfill part or all of my IRA required minimum distribution for year 20__.

This letter is sufficient authorization for you to make this QCD gift. However, if you require any further documents completed, please promptly send those to me.

Cordially yours,

(Signature)

(Print Name and Address)