Help Support Our Cause

Your gifts make a difference and your generosity will enable us to continue our important work. An IRA rollover to gift annuity is an excellent plan. It helps you achieve your personal and philanthropic goals and build a legacy for the future.

Contact Us

Your IRA rollover to a gift annuity will make a significant difference in helping us further our mission. Please contact us to learn more. Our staff will be happy to work with you to ensure that your gift achieves your goals.

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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.

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IRA Rollover to Gift Annuity

Prepared for Jane Donor
Are you frustrated by the required minimum distribution (RMD) rules? If you roll over part or all of your RMD to our charity, you may reduce your tax bill. Let’s review the guidelines for taking your RMD each year after age 72.

- **IRA Required Minimum Distribution** - You must withdraw a portion of your IRA each year based upon your age.
- **You must pay income tax on the portion you withdraw.**
- **You will face stiff penalties if you fail to withdraw your RMD.**

The law allows a one time gift up to $50,000 per person from an IRA to a charitable gift annuity. If you are 72 or older, rather than simply take an IRA withdrawal this year, you can direct your IRA administrator to distribute a gift from your IRA to us for a gift annuity.

**IRA Rollover to Gift Annuity**

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If you are over age 72, your IRA rollover to a gift annuity may fulfill part or all of your required minimum distribution. You can combine fixed payouts for your lifetime with a future generous gift to our charitable work.

**IRA Rollover to Gift Annuity**

Jane Donor - Age 75

- **IRA Rollover**
  - $10,000
- **Gift Annuity**
  - $10,000
- **Charity**
  - $10,000

1. IRA rollover charitable gift. Transfer from IRA custodian to charitable organization. May fulfill your IRA required minimum distribution (RMD).
3. Property passes to charity with no probate fees. Donor has satisfaction of fulfilling charitable purpose.

This educational illustration is not professional tax or legal advice; consult a tax advisor about your specific situation.