

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.

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



A Plan for Today With Benefits Now

Benefits

- **IRA Required Minimum Distribution** - You must withdraw part of your IRA each year after age 70½. You pay income tax on your IRA payout.
- **Another IRA Option** - The law allows IRA owners over age 65 to give up to \$400,000 to a charitable gift annuity.
- **How to Give an IRA** - If you are 65 or older, you can direct your IRA administrator to distribute an IRA gift to us for a gift annuity.



IRA Required Minimum Distribution

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 70½.

- 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.



IRA Rollover to Gift Annuity

The law allows up to \$400,000 per person to be distributed from an IRA to a charitable gift annuity each year. If you are 65 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.

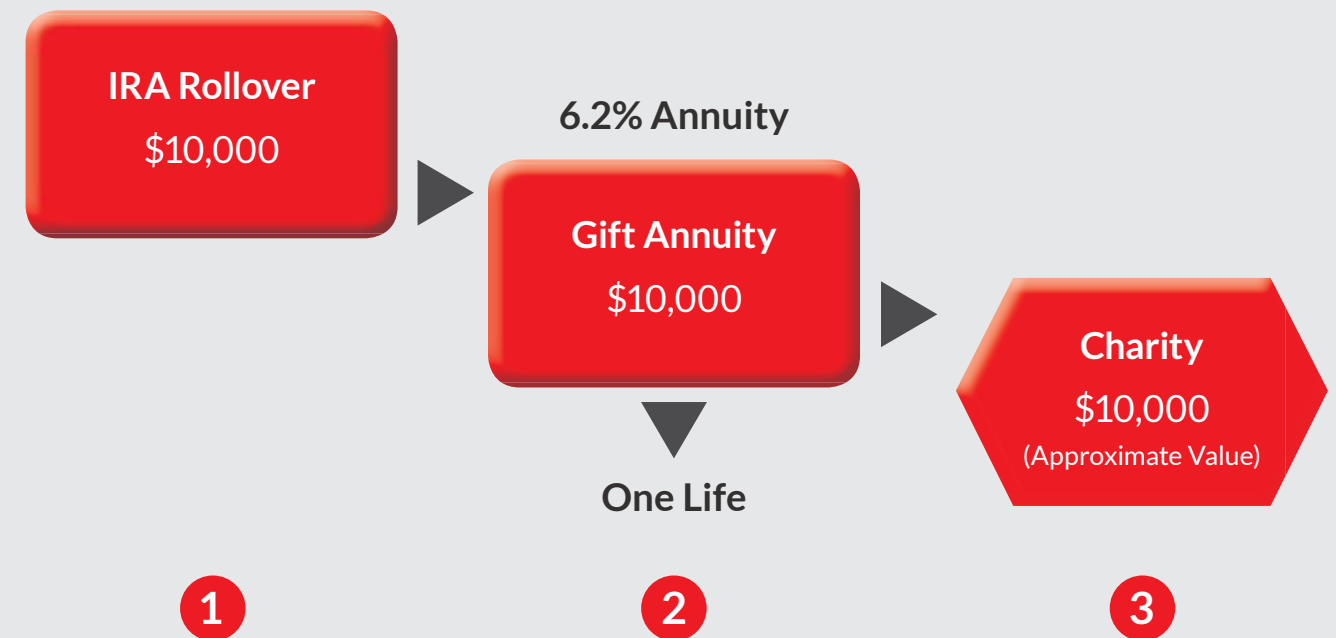
If you are over age 70½, your IRA rollover to a gift annuity may fulfill part or all of your required minimum distribution. You can combine fixed payouts for your lifetime with a future generous gift to our charitable work.



Make an Impact

IRA Rollover to Gift Annuity

Jane Donor - Age 75



1
IRA rollover charitable gift. Transfer from IRA custodian to charitable organization. May fulfill your IRA required minimum distribution (RMD).

2
Annuity of \$620 for one life. Payouts are taxable income. Estimated one life payout of \$9,486.

3
Property passes to charity with no probate fees. Donor has satisfaction of fulfilling charitable purpose.