

## IRA Charitable Rollover Gift

At the end of 2015, the U.S. Congress passed legislation making the IRA direct charitable rollover gift option permanent. The law allows “senior” charitably-minded individuals a golden opportunity to make gifts to churches and other charities directly from an IRA (Individual Retirement Account) and exclude the amount of that gift from gross income (i.e., make a tax free gift!).

Investing in your church’s future can yield invaluable returns to your congregation and community for generations to come. The **IRA Charitable Rollover** provides you with an excellent opportunity to make a gift during your lifetime from an asset that would be subject to multiple levels of taxation if it remained in your taxable estate. This gift can make a significant impact on the mission and ministries of your church.

**Important:** Be sure to check with your financial advisor to determine whether this gift plan is right for you. This information is not meant as tax or legal advice.

Our **KnowledgeBase** includes a pdf version of the **Wisconsin United Methodist Foundation’s** brochure on the **IRA Charitable Rollover**. Feel free to print and distribute copies in your congregation.

If you have questions or require more information please contact the Wisconsin United Methodist Foundation  
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