

WHY DONATE VIA INDIVIDUAL RETIREMENT ACCOUNT

Support the causes you care about and save on taxes at the same time! You can donate up to \$111,000 from your traditional IRA - tax-free.

THIS STRATEGY MAY BE RIGHT FOR YOU IF YOU:

- Are age 70 ½ and older
- Want to reduce the value of future distributions you will be required to take
- Do not itemize your deductions and would like to realize an increased tax benefit for your giving
- Already contribute to charity at your deduction limit, and you want to donate more
- Do not need your Required Minimum Distribution
- Have a secondary smaller IRA you do not need
- Wish to reduce your IRA and remove it from your taxable estate

If you have any questions or would like more information, please reach out to your financial advisor or Lara Agatstein at Lara@ujf.org.