

## IRA CHARITABLE ROLLOVER

An Easy and Convenient Way to Make a Gift Using Your Assets

### Important Details

- If you are **70-1/2 or older**, you can give up to \$100,000 directly from your IRA. A husband and wife can **each** give up to \$100,000.
- Your rollover gift **must be made directly to the Catholic Community Foundation from your IRA**. So, your IRA administrator can either cut a check payable to the CCF or wire your cash to us. Please contact us for cash wiring instructions.
- Be sure to **inform us of your gift ahead of time** so we will know the rollover is from you.
- The gift **must come directly from the IRA to the Catholic Community Foundation**. You cannot transfer the rollover cash to yourself or to a non-IRA account prior to the gift.
- You can rollover cash tax-free from another qualified retirement account to an IRA then make a rollover gift to the CCF if you wish.
- The charitable rollover generates **neither taxable income nor a tax deduction, so you still benefit even if you do not itemize your tax deductions**.
- If you have not taken your **required minimum distribution** for the year, your IRA charitable rollover gift can satisfy all or part of that requirement.
- Your IRA charitable rollover may be designated for a **parish, school or agency, the United Catholic Appeal, as well as a Catholic Community Foundation fund, to benefit a Catholic ministry**.

**Take advantage of this tax savings benefit** by transferring required minimum distributions from retirement plans directly to the Catholic Community Foundation to support a parish, school, agency, the United Catholic Appeal, or ministry important to you! For questions or wiring instructions please contact:

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