UNITED WAY OF GREATER ROCHESTER
IRA CHARITABLE ROLLOVER

Build your legacy of community support with an IRA Charitable Rollover to United Way of Greater Rochester. A charitable IRA rollover allows individuals ages 70½ years or older to make gifts to charities, including United Way, directly from an Individual Retirement Account (IRA). With this gift, you will help create a legacy of community improvement—for the challenges we face today and the efforts to create a vibrant Rochester into the future.

DONOR BENEFITS:
· IRA Charitable Rollovers provide a simple way to support our community by making a gift from a major asset.
· When you transfer funds directly to United Way from an IRA, the funds can potentially reduce your taxable income.
· The charitable contribution counts towards minimum distribution requirements from IRAs.

CONDITIONS:
· IRA Charitable Rollover gifts are for donors ages 70½ or older. Note that required minimum distributions begin at 72 years of age.
· An annual IRA gift cannot exceed $100,000 per donor.

Thank you for building a lasting legacy of support for our community with United Way of Greater Rochester. Please contact your IRA plan administrator to make a distribution directly to United Way.

For more information or to discuss options, please contact Julie Marsiglio, Director of Major Gifts, at (585) 242-6465 or Julie.Marsiglio@uwrochester.org.

United Way does not provide tax advice. Please consult a tax professional, financial planner, and/or attorney in regards to your personal circumstances and what option helps meet your financial and philanthropic goals.

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