

Rollover Retirement Assets for Immediate Impact.

If you are age 70 1/2 or older, the charitable IRA rollover is an easy tax-efficient way for you to support Loyola on the Potomac. You may transfer up to \$100,000 a year directly from your traditional or Roth IRA to Loyola on the Potomac—the amount of your gift will not be included as taxable income, and your gift can count toward your required minimum distribution. If you do not itemize or are subject to charitable deduction limits the IRA rollover still allows you to give while receiving tax benefits.

If you are considering an IRS rollover gift:

- ◆ Consult with your advisor to make sure the IRA rollover is a good fit for you.
- ◆ Contact your IRS custodian and instruct your custodian to make a distribution directly to Loyola on the Potomac.
- ◆ Provide your IRA custodian the Loyola on the Potomac tax ID number, 53-0225164
- ◆ Charitable rollovers can be made at any time during the year, but must be made by December 31st to receive the tax benefits for that year.
- ◆ Let us know your gift is on the way so we can acknowledge it properly.

Contact Our Marketing and Development Office

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