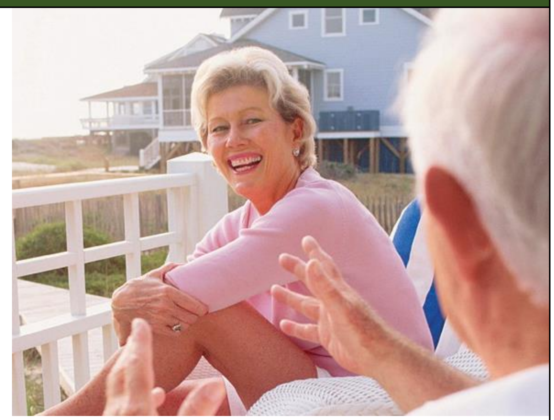
Make the gift of a lifetime with a Charitable Rollover from an IRA

People age 70½ and older can transfer up to $100,000 per year
from individual retirement accounts (IRAs) to charity—
without incurring federal income taxes today or estate and income taxes in the future.



The 2015 PATH Act made the IRA Charitable Rollover permanent law.

Is a Charitable Rollover right for you?
Consider these questions when speaking to your advisor about a gift from your IRA:

- Are you planning to leave a charitable legacy?
- Have you designated a nonprofit as a beneficiary to your IRA?
- Is there a special cause that you care about?
- Have your retirement savings exceeded your expectations?
- Are you subject to a charitable deduction limitation?
  Or, do you take the standard tax deduction and do not itemize?
- Does a large estate put your IRA at risk of high estate and income taxes?
- Are you on the border of more tax on Social Security benefits or higher Medicare premiums?

We are ready to help you and your advisors with your IRA Charitable Rollover to establish one of the many types of charitable funds that are eligible to receive IRA gifts.

Designated Funds: Defining your Giving

Name specific nonprofits to receive grants, and we will make those grants over time. Giving parameters, including time period, are set when the fund is established, so your giving is on auto-pilot. It is the most common way to preserve your charitable legacy.

Area-of-Interest Fund: Choosing a Cause

An area-of-interest fund supports programs & initiatives that tackle an issue of your choosing, such as the environment or animal shelters. The Community Foundation identifies and awards grants to charitable programs that support the cause.

Community Partnership Funds: Meeting the Region's Changing Needs

Community Partnership Funds make sure the needs of tomorrow's Lehigh Valley are met. Donors rely on the deep community knowledge & experience of the Community Foundation to support the effective work of nonprofits throughout the region, forever.

We are here to help!

We're happy to work with you to establish a charitable fund that accomplishes your financial and philanthropic goals.

Please contact Erika Riddle Petrozelli, Director of Donor Services, to learn more!

Lehigh Valley Community Foundation

Connecting people who care…
to causes that matter

Visit us at:

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Suite 310
Allentown, PA 18101

Contact us at:

(610) 351-5353
www.lvcfoundation.org

LEHIGH VALLEY
Community
Foundation