

3 Simple Steps to the IRA Charitable Rollover

1

Plan Ahead

Contact your professional advisor in October/November to **make a gift before year end.**

2

Make a Gift to Charity

Visit occf.org/IRA to choose a giving option and download a sample letter to your IRA administrator.

3

Save on Taxes

An IRA gift up to \$100,000 is **not included in your taxable income and satisfies your required minimum distribution** for the year.

Call us to learn more: 405/606-2914



OKLAHOMA CITY
COMMUNITY FOUNDATION

Helping you help the community

P.O. BOX 1146

OKLAHOMA CITY, OK

73101-1146

www.occf.org

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Give **More** for Less **This Year**

Are you or someone you know age 70 ½ or older? Learn how to make a tax-free gift up to \$100,000 from your IRA to the Oklahoma City Community Foundation to support your favorite charitable cause.

Benefits of IRA Rollover Gifts:

- By using pre-tax IRA assets, your charitable gift costs you less.
- Not subject to income taxes.
- Can be used to meet your annual required minimum distribution, lowering your taxable income for the year.
- Designate your gift for scholarships, charitable organizations or charitable fields of interest.



*By planning ahead each year for an **IRA Charitable Rollover** gift, it **helps our charitable dollars go further.** It just makes financial sense and allows us to support scholarships for students who were in foster care.”*

– Janice Haunschild

Visit occf.org/IRA or call Joe Carter at **405/606-2914** to learn more.



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