



ROCHESTER
UNIVERSITY

REDUCE

your tax burden

EVEN IF YOU DON'T ITEMIZE

Do you own an IRA or other qualified retirement plan?

*Are you looking for a tax-wise strategy to make gifts
that support the Rochester University mission?*

*If so, consider making an
IRA charitable rollover gift.*



IRA

Charitable Rollover Gift

70½ or older | Direct up to \$100,000



May satisfy your annual required minimum distribution, or RMD, up to the amount of your gift



Allows you to give from pre-tax assets and your distribution is excluded from taxable income



Helps avoid limits on charitable deductions and prevents you from being pushed into a higher tax bracket



Simplifies the giving process. It's easy to do—just notify your IRA custodian.



Minimizes the effect your giving has on your cash flow. The gift is from your assets, not your checkbook.

What are the tax benefits of an IRA charitable rollover gift?

An IRA rollover has several significant tax advantages. It allows you to give from pre-tax assets.

If you do not itemize or are subject to charitable deduction limits, the IRA rollover still allows you to give while receiving tax benefits.

An IRA rollover gift could also help you avoid income that could push you into a higher tax bracket.



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**800 West Avon Road
Rochester Hills, MI 48307
248.218.2021
development@rochesteru.edu
RUgiving.org**

1. Cut off this half of the postcard and complete the form on the back.
2. Fold and seal with tape before mailing.



**If you would like more information
on how to make a charitable gift to
Rochester University, visit us at
RUgiving.org or call 248.218.2021.**

May We Help You?

To learn more, please contact us. Please check off your preferences, fill in your information, and mail this form back to us. We would welcome the opportunity to answer further questions and work with you.

- Send me more information on IRA charitable rollover gifts.
- Contact me on ways to make a year-end gift.
- I've already included your organization in my estate plans.

The best way to contact me is by:

- Email
- Mail
- Phone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

(All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal, or financial advice.

Gift results may vary. Consult your personal financial advisor for information specific to your situation.



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