

Easy IRA Gift



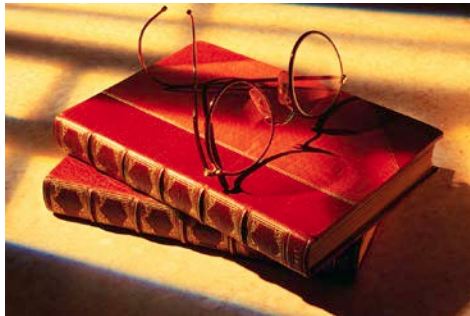
Barbara retired after 40 years as a teacher. She had volunteered for many years with United Way of Northeast Georgia. She had an IRA and was nearing the time to take her required payout for this year in the amount of \$2,000. Since Barbara did not need the income, she decided to make a gift of \$2,000 from her IRA to reflect her support.

Barbara: My pension had benefited from the last stock market boom. I had more IRA income than I needed to cover my living expenses. I saw all of the good United Way had accomplished over the years and wanted to give something back.

Barbara called her gift planner and learned of a simple and easy method to make a gift to benefit United Way. Now that she is over the age of 70.5, she has the option of rolling over up to \$100,000 from her IRA to charity without paying any taxes.

Barbara called her IRA custodian and requested a transfer of her \$2,000 required distribution from her IRA directly to United Way.

Barbara: It was very easy to make an IRA charitable gift. The part I like best is that I could help my favorite charity with my required distribution.



For more information on one of the following options please call or e-mail Gerry Taylor at United Way of Northeast Georgia 706-543-5254 or gerryktaylor@bellsouth.net.

1. You would like to receive more information on the benefits of an IRA.
2. You would like to receive a presentation about making an IRA gift..