



EPISCOPAL CHURCH IN CONNECTICUT
PARTICIPATING IN GOD'S MISSION

IRA Charitable Rollovers

A direct transfer from your IRA to a charity of your choice such as the Episcopal Church in Connecticut or your parish can be a great way to make a tax-wise gift. A qualified transfer will count towards your required annual IRA minimum distribution and be excluded from your gross income.

To qualify for these benefits:

- You must be age 70 ½ or older at the time of the gift
- Your gift must be made directly from your IRA to the charity
- You may transfer up to a total of \$100,000/year
- The gift must be outright and cannot be used to create a gift annuity or charitable trust.

This opportunity may have great tax benefits for you, while also providing critically needed support for the charity. Each IRA administrator has its own procedures for IRA Charitable Rollovers, so be sure to contact your IRA administrator. You will usually need to provide the IRA administrator with the charity's federal Tax Identification Number and its address. The Episcopal Church in Connecticut's Tax Identification number is: 06-0646602.

If you have any questions, please contact:

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We advise you to review this information with your own independent tax advisor. This information is not provided as legal, tax or financial advice. Please discuss these issues with your own independent advisors.
