

BECAUSE OF YOU,

EVERY KID CAN.



IRA CHARITABLE ROLLOVER

If you are 70 ½ or older, you can take advantage of the now permanent (as of January 1, 2015) IRA Charitable Rollover. Rollover gifts from your IRA are tax-free and allow you to make an immediate impact on the thousands of patients and students Franciscan Children's serves with complex medical, mental health, and special educational needs.

Benefits of the IRA Charitable Rollover:

- **EASY** | A rollover gift from your IRA must be transferred directly from your IRA account to Franciscan Children's. Click [here](#) to download a sample request form that you can use to notify your IRA administrator.
- **IMPACTFUL** | This outright gift from your IRA will allow you to see the direct impact your generosity has on the lives of patients and their families.
- **TAX SAVINGS** | This gift does not generate taxable income or a tax deduction so you benefit even if you do not itemize your deductions. IRA charitable rollover gifts can also be used to satisfy all or part of your required minimum distribution for the year.

Do I Qualify?

- Your gift must be transferred directly from your IRA to Franciscan Children's
- You must be at least 70 ½ years old at the time of the gift
- Your gift cannot exceed \$100,000 per donor
- Your gift must be made by December 31st to be counted towards your required minimum distribution for the year

Questions?

Please contact Audrey Jensen, Director of Development, at 617-779-1115 or AJensen@FranciscanChildrens.org

The information provided should not be considered legal, tax, or financial advice. We encourage you to discuss planned giving options with your attorney and/or financial planner. Please note Franciscan Children's Tax ID is **042-156-082.*