

Date  
Name of IRA Custodian  
Address  
City/State/Zip

Dear IRA Custodian,

In late December 2015, Congress passed, and the President signed into law, legislation that made permanent the ability to roll over funds directly from an IRA to a qualified charitable organization. As the owner of IRA account # \_\_\_\_\_ that is in the custody of your organization, I request that you transfer from that account the sum of \$ \_\_\_\_\_ to

\_\_\_\_\_ United Methodist Church

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

The Treasury Tax ID Number for \_\_\_\_\_

United Methodist Church is \_\_\_\_-\_\_\_\_-\_\_\_\_.

It is my intention to make a Qualified Charitable Distribution (QCD) to \_\_\_\_\_ United Methodist Church from my IRA. It is also my intention that this distribution \_\_\_ will / \_\_\_ will not (*choose one*) fulfill part or all of my IRA required minimum distribution for this year.

This letter is sufficient authorization for you to make this QCD gift. However, if you require any further documents, please promptly send those to me.

Cordially yours,

Name of Donor  
Address  
City/State/Zip

*Inspiring  
Spiritual  
Growth  
through  
Generosity*



122 West Franklin Ave., Ste. 508  
Minneapolis, MN 55404

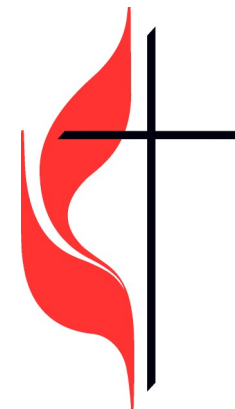
612-230-3337  
mnumf.org (foundation website)  
mnumf.giftlegacy.com (gift legacy website)

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# IRA Charitable Rollover

## An Easy Way to Give Generously!



## Roll Over Your Traditional or Roth IRA

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## If you are 70½ or older and have a Traditional or Roth IRA -

- You may give up to \$100,000 to a charitable organization
- No income tax on the distribution
- Your gift satisfies all or part of the annual Required Minimum Distribution (RMD)
- Give a gift to your local church or any United Methodist ministry of your choosing
- Fund your church's operating budget or fund a special project
- Establish a permanent endowment fund to benefit your church in perpetuity

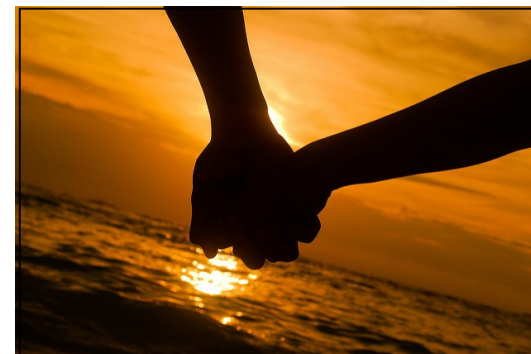


## IRA Charitable Rollover

It is wise to consult your IRA custodian or financial planner to assist you.

The Minnesota United Methodist Foundation is also available to assist you.

Please call us at 612-230-3337 or email Val Walker at [val.walker@mnumf.org](mailto:val.walker@mnumf.org).



## Give Generously!

To make a Charitable Rollover Gift, please see the sample letter on the back of this brochure. (It requires the federal tax ID number of your church or the charity you wish to benefit. Please call your church treasurer.)

When you have completed and signed the letter, send it to your IRA Custodian and ask to have a direct transfer of funds from your IRA to your local church or charity.

Be sure that the check is made payable to the church or charity, even if it is mailed to you.

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