

TAKE ADVANTAGE TODAY!

Before December 31 - IRA Charitable Rollover



Who can take advantage of the IRA charitable rollover provision?

If you have an IRA and you are 70½ or older, you and your spouse (each) can make a tax-free charitable distribution from your IRA.



What is the maximum gift?

A gift of up to \$100,000 can be made from your IRAs.



Who can receive this gift?

The IRA must be gifted directly to a public charity, such as Temple Beth Shalom.



What is the deadline?

Now through December 31.

Top 3 Benefits

- 1 Help satisfy your required minimum distribution
- 2 Reduce your taxable income
- 3 Build our endowment at TBS for future generations



Consult

Please consult with your tax professional to learn how an IRA charitable rollover may benefit you.

How to complete an IRA charitable rollover TODAY

Step 1

Contact your IRA custodian to learn their procedures.

Step 2

Contact TBS. We can provide wire transfer instructions for your IRA custodian to transfer the funds or notify us if your IRA custodian will be sending your funds by check.

Already made your distribution this year?

You can do this anytime next year as this provision is permanent. It will count towards next year's distribution.

Contact

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Thank you for considering Temple Beth Sholom in your year-end tax planning.



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