

UNITED WAY OF GREATER ROCHESTER IRA CHARITABLE ROLLOVER

Build your legacy of community support with an IRA Charitable Rollover to United Way of Greater Rochester.

A charitable IRA rollover allows individuals ages 70½ years or older to make gifts to charities, including United Way, directly from an Individual Retirement Account (IRA). With this gift, you will help to create a legacy of community improvement—for the challenges we face today and the efforts to create a vibrant Rochester into the future.

DONOR BENEFITS:

- IRA Charitable Rollovers provide a simple way to support our community by making a gift from a major asset.
- When you transfer funds directly to United Way from an IRA, the funds can potentially reduce your taxable income.
- The charitable contribution counts toward your minimum distribution.

CONDITIONS:

- IRA Charitable Rollover gifts are for donors ages 70½ or older.
- The annual IRA gift cannot exceed \$100,000.

BE PART OF UNITED WAY OF GREATER ROCHESTER

Founded by George Eastman 100 years ago, United Way harnesses the power of collective giving to create a thriving community. Together, we invest in solutions to critical local challenges, connect resources to unite communities, and work collaboratively to solve problems. Thank you for serving the Greater Rochester region with United Way.



George Eastman at the beginning of his career

Thank you for building a lasting legacy of support for our community with United Way of Greater Rochester. Please contact your IRA plan administrator to make a distribution directly to United Way.

For more information or to discuss options, please contact Julie Marsiglio, Director of Major Gifts, at 585 242-6465 or Julie.Marsiglio@uwrochester.org.

United Way does not provide tax advice. Please consult a tax professional, financial planner, and/or attorney in regards to your personal circumstances and what option fits best to help meet your financial and philanthropic goals.

INVEST. CONNECT. SERVE.



United Way of Greater Rochester • 75 College Avenue • Rochester, NY 14607-1009

