



IRA Charitable Rollover Fact Sheet

(Qualified Charitable Distribution)

The IRA charitable rollover may be used as a convenient, tax free way to make gifts up to \$100,000 per year to Forsyth Humane Society and satisfy IRA required minimum distributions at the same time.

Here are some key features of the IRA charitable rollover.

- You must be 70 ½ years of age or older.
- You may transfer up to \$100,000 per year directly from your IRA to Forsyth Humane Society
- You may not receive any goods or services in return for your IRA rollover gift. This includes funding a lifetime income arrangement such as a charitable gift annuity or charitable remainder trust.
- Married couples can each gift up to \$100,000 per year from their IRA if they each meet the requirements above.

What do I need to complete an IRA Charitable Rollover Gift?

- Legal Name – Forsyth Humane Society
- Tax ID Number – 23-705586
- Address – 4881 Country Club Road, Winston-Salem, N.C. 27104
- It is best to notify a charity when you make an IRA Charitable Rollover gift so that your gift can be matched to you when it arrives. Many financial institutions do not include the donor name on the check.

Please talk with your tax advisor or other financial professionals to determine if an IRA charitable rollover could benefit you. In addition, please feel free to contact Darla Kirkeeng at (336) 546-1411 or email dkirkeeng@forsythhumane.org



Country Club Location | 4881 Country Club Rd | Winston-Salem, NC 27104 | (336) 721-1303

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