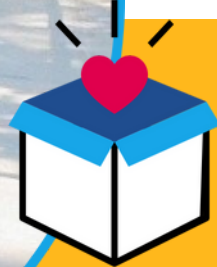


Smart giving and generosity for Perkins can come together with an IRA charitable rollover.

An IRA Charitable Rollover can help you:

- Make a tax-savvy gift directly from your IRA
- Satisfy your minimum distribution requirement
- Minimize the tax burden to your heirs



Discover how you can convert a common asset into a meaningful gift to Perkins School for the Blind by using an IRA charitable rollover.

// I can donate all or part of my IRA required minimum distribution directly to Perkins, maximizing my gift while minimizing my taxes."

With an IRA Charitable Rollover—also called a **Qualified Charitable Distribution**—individuals who are 70 ½ or older can give up to \$105,000 per year (\$210,000 per couple) directly from an individual retirement account to Perkins School for the Blind. Qualified distributions are typically not subject to income tax, and may be used to satisfy some or all of your required minimum distribution.



This information is provided for illustrative purposes only and should not be considered legal or financial advice. We encourage you to discuss these giving options with your own legal and financial advisors.



Simple steps to your IRA Charitable Rollover:

1. Contact your plan administrator to initiate the distribution directly from your IRA to Perkins. We can provide template letters that may be helpful to you. Contact us if you need help getting started, your companies have forms and instructions directly on their website.
2. Notify the Office of Planned Giving that you're initiating the transfer, so we can confirm receipt of your gift, and share our appreciation.
3. Receive Perkins' thanks and acknowledgement for your generosity. That's it!

A gift with many potential benefits:

- Utilize an often-overlooked asset for giving.
- Satisfy some or all of your minimum required distribution.
- Reduce your taxable income.
- **Give more, to Perkins and your heirs.**

While the IRA assets your heirs receive from you may be reduced by income and estate taxes, Perkins will receive the full amount of your gift. This may make it possible to give more to your family, as well as a tax-exempt organization like Perkins.

Creating a life income gift with funds from your IRA: As of 2023, you can create a life income gift that benefits you and Perkins. Limitations do apply, so please contact Perkins to learn more.

Did you know you can make Perkins School for the Blind a remainder beneficiary of your IRA?

Making Perkins a beneficiary of your IRA or other financial account is a simple and fully revocable way to support Perkins' future. Typically, all you need is a Beneficiary Designation Form from your plan administrator. Contact us for details.

Your IRA Charitable Rollover will have a lasting impact for Perkins, and you.

Each year, more people in the Perkins community discover the simple benefits and long-term impact of an IRA Charitable Rollover. Unrestricted gifts are vital to Perkins' ongoing operations and mission of the School; you may also choose a gift designation with particular meaning for you.



The 1829 Legacy Circle honors those who have arranged a planned gift for Perkins School for the Blind. Anonymous members are welcomed.

We're here to help.

The Office of Planned Giving is pleased to provide you with information on gifts through your estate and other planned gifts. Contact Jennifer Volpe at **617-972-7667** or **Jennifer.Volpe@Perkins.org**. We look forward to hearing from you!