

IRA CHARITABLE ROLLOVER

A Sweet Choice

If your IRA is life's dessert, the thought of being forced to pay taxes on a distribution you would rather not take may leave a sour taste in your mouth.

It does not have to.



HOW CAN WE HELP?

- Please send me more information on IRA charitable rollover gifts.
- Please contact me with more information about planned gifts and estate planning strategies.
- I have already included your organization in my will or trust.
- Please send me your FREE estate planning guide.

The best way to contact me is by:

- Email
- Mail
- Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

(All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

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Life's Dessert

Your IRA is a well-earned dessert for a life well lived. Do not let the government spoil it by forcing you to pay income tax on a withdrawal you would rather not take. If you are 72 or over, call or email us to find out how the IRA rollover helps you avoid income taxes while helping others. It may be the sweetest decision you make this year.

To learn more, please contact us. We would welcome the opportunity to answer further questions and work with you and your advisors.