

## **GIFTS OF RETIREMENT ASSETS**

### **QUALIFIED CHARITABLE DISTRIBUTION**

If you have an IRA and are age 70½ or above, you can give a Qualified Charitable Distribution (QCD) directly from your IRA to A New Leaf, for any amount up to \$100,000 per year.

While there is no tax deduction for a QCD, by having your IRA administrator send the funds directly to A New Leaf, you reduce your taxable income and avoid paying income taxes on the withdrawal. This may also help to lower your Medicare premiums and decrease the amount of Social Security subject to tax.

### **BENEFICIARY DESIGNATION**

Since non-spousal heirs are taxed on inherited retirement assets, many donors donate these assets first to charity, reserving other tax-free assets for their heirs. You can designate all or a percentage of your IRA or other retirement assets to A New Leaf by simply completing your plan's beneficiary designation form and naming A New Leaf as charitable beneficiary.

### **INFORMATION TO SHARE WITH YOUR IRA ACCOUNT ADMINISTRATOR**

**Legal Name:** A New Leaf  
**Address:** 868 E. University Drive  
Mesa, AZ 85203  
**Federal Tax ID:** 86-0256667  
For the benefit of A New Leaf

A New Leaf recommends that you consult your legal or financial advisors when considering what type of planned gift best suits your unique circumstances.

For more information about making a gift from your IRA, please contact:



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