



Catholic Foundation
for the Diocese of Green Bay, Inc.

Make Your IRA Charitable Rollover Gift

An IRA rollover gift is a simple and easy way to use your IRA to reduce taxes and support your parish, the Catholic Foundation, another Catholic ministry, or the Bishop's Appeal.

You can reduce your taxes by making a gift from your IRA to a charity. Individuals who are 70 ½ can make a charitable gift in 2025 of up to \$108,000 from an IRA. Your gift will qualify for your required minimum distribution (RMD), and you will not have to pay federal income tax on the amount given from your IRA to charity.

An IRA Gift Will:



not be included in your taxable income.



satisfy your required minimum distribution for the year.



reduce taxable income, even if you do not itemize deductions.



not be subject to the 50% limitation on charitable gifts.



Help the work of the Church!

Tips to Handle Your Charitable Gift Correctly

- Gifts must be made directly from your IRA to charities such as your parish, another non-profit, or the Catholic Foundation.
- Gifts may not be made to donor advised funds, private foundations, or supporting organizations.
- Provision applies only to IRA's, **not** 401(k)s, 403(b)s, or other similar qualified retirement plans.
- Contact your IRA administrator **before** making a gift to arrange for proper transfer of funds. The check issued must be written directly from the IRA payable to the charity.
- Consult with your tax advisor for proper tax reporting.

Not Ready to Give from an IRA?

Consider making a charitable bequest from your Will or Trust. You use the funds you need during your lifetime, and the Church benefits in the future from what remains. Talk to your attorney or financial advisor about the best solution for your family.



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