

Other Methods of Donating to the American Catholic Historical Society

IRA Charitable Rollover Gifts

Did you know you can reduce your taxes by making a gift from your IRA directly to charity? If you are 70 1/2 years old or older, you can make a charitable gift up to \$100,000 directly from your IRA. This direct distribution can be made to the American Catholic Historical Society.

An IRA charitable rollover gift is an easy way to help fulfill the Society's mission to collect, research, and maintain a history of Catholic contributions to our culture and reduce your taxable income. Your gift will qualify for your required IRA minimum distribution. Also, you will not have to pay federal income tax on the amount given directly from your IRA to a charity. Qualified direct distributions made from your IRA are not subject to income tax.

In past years, a distribution from your IRA would have been taxed as ordinary income. However, Congress passed a law several years ago making the IRA charitable rollover permanent. Here is how the IRA charitable rollover works:

- You must be 70 1/2 years of age.
- Your gift must come from an IRA (not a TSA or 401k).
- Your gift is a direct transfer to a qualified charity such as the American Catholic Historical Society.
- The maximum amount you can transfer is \$100,000.
- To qualify as an IRA charitable rollover, your gift must be made by December 31st of the current year.
- It is also important not to withdraw funds prior to making your gift. Instead, distribute the funds directly from your IRA to the American Catholic Historical Society.
- Note: As with any major monetary decision, please consult your financial advisor.

Planned or Deferred Gifts

Planned or deferred gifts can provide significant benefits to you and your loved ones now and in the future, while benefiting the Society for generations to come. Some planned giving methods include:

- bequests
- gifts of retirement assets
- gifts of life insurance
- Note: As with any major monetary decision, please consult your financial advisor.

Provide the following information to the institution or advisor that manages your IRA, will or trust:

Attn: Eric German, ACHS Treasurer
263 South Fourth Street, Philadelphia, PA 19106
Work: 215-923-1733 X101

We thank you for considering these options to support and remember America's oldest Catholic historical society - the American Catholic Historical Society.

For more information [Please click here to access the IRS link](#) for a list of the Qualified Charitable Deduction Tax Rules that must be followed to enable the tax-free income exclusion.