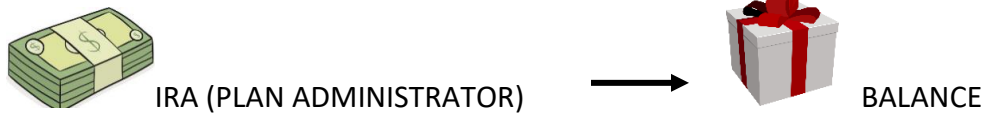


## Qualified Charitable Distribution (IRA Charitable Rollover)

You may be looking for a way to make a big difference to help further Balance's mission. If you are 70½ or older you may also be interested in a way to lower the income and taxes from your IRA withdrawals. A Qualified Charitable Distribution (IRA Charitable Rollover) is a way you can help continue Balance's work and benefit this year.



### Benefits of a Qualified Charitable Distribution (IRA Charitable Rollover)

- Avoid taxes on transfers of up to \$100,000 from your IRA to Balance
- Satisfy your required minimum distribution (RMD) for the year
- Reduce your taxable income, even if you do not itemize deductions
- Make a gift that is not subject to the deduction limits on charitable gifts
- Help further the work and mission of Balance

### How a Qualified Charitable Distribution (IRA Charitable Rollover) gift works

1. Contact your IRA plan administrator to make a gift from your IRA directly to Balance. Please request that your name be included with the transfer information so we are able to thank you for your gift. Balance's Tax ID or EIN number is: 39-1771303.
2. Your IRA funds will be directly transferred to Balance to help continue our important work.
3. Please note that Qualified Charitable Distribution (IRA Charitable Rollover) gifts do not qualify for a charitable deduction.
4. Please contact us if you wish for your gift to be used for a specific purpose.

### Contact us

If you have any questions about a Qualified Charitable Distribution (IRA Charitable Rollover) gift, please contact Balance at 262-268-6811. We would be happy to assist you or your plan administrator and answer any questions you might have.