Five Minutes to a Brighter Future

Visit our website where you will find different tax-saving tools. Each provides a brief, helpful explanation showing how you can lower taxes and make your mark. Check out the "IRA Charitable Rollover" online tool. It will show you a simple way to time your tax deductions and use your hard-earned money to its greatest advantage.



The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

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LET US KNOW HOW WE CAN HELP YOU

- ☐ Contact me with more information about planned gifts and estate planning strategies.
- ☐ Please send me your free Estate Planning Guide.
- ☐ I have included your organization in my will or trust and want to discuss my legacy.

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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IRA Charitable Rollover

ONLINE TOOL



You have invested in your IRA for years. Isn't it worth a couple minutes to learn how to save it from too much income taxes?

GOOD SHEPHERD
CATHOLIC SCHOOL

IRA Distribution to Tax Saving Solution

If you have an IRA, you may be concerned about Required Minimum Distributions. Who wouldn't be? You have been saving all your life, and now the government is forcing you to take money from it. But did you know you have choices?

Required Minimum Distribution Changes

The rules for IRAs have changed in recent years, and you need to know your options. On our website we have the IRA Charitable Rollover tool, which can bring you up to speed with your IRA rollover gift in just a few moments.



Quick Click, No Tricks

Visit our website to learn all your IRA possibilities. In just a few moments you'll discover a way to avoid or reduce paying income tax on your IRA's required distribution. You'll also see how to create a new income stream with your IRA. Everything is in easy, understandable language. There is no cost or obligation, and you can explore in the privacy of your home. If you do have questions, or want more tax-saving ideas, contact us. We are happy to help.

IRA Rollover widget

Explore the IRA Charitable Rollover tool on your own and with your tax advisor. However, we are always here to help. Contact us for even more tax-savings ideas.