



IRA, ROLLOVER!

Would you like a tax break while helping save the lives of homeless pets in our community? An IRA Charitable Rollover is a wonderful way to help heal the pets in AHS' care.

As you know, individuals over the age of 70.5 are required to take an annual minimum distribution from their traditional IRA accounts. You can reduce your income tax liability on your required minimum distribution by making a tax-free charitable IRA distribution to AHS. To qualify, you must:

- Be age 70½ or older at the time the IRA distribution is made to AHS.
- Take your IRA distribution and make the donation before December 31 to qualify for this year.
- Make the distribution directly from your IRA account to AHS. You do this by contacting your IRA custodian and directing them to issue a check in the amount you specify directly to AHS.
- Provide your IRA custodian with the following information so they can issue a check payable to AHS:
 1. Legal Name: Arizona Humane Society
 2. Federal Tax ID: 86-0135567
 3. Address: 1521 W. Dobbins Road, Phoenix, AZ 85041
 4. **Ask the custodian to put your name in the "memo" line of the check or include a letter stating your name and address.** That way we'll know it's from you and can provide you with a charitable tax receipt for your records. Your IRA custodian can mail the check directly to us or you can deliver it in person or mail it to us.

Will you consider making a difference in the life of an animal by directing your pre-tax IRA dollars to AHS? If so, please contact Joyce Melter at 602.997.7585 Ext. 1034 or jmelter@azhumane.org.

Please remember to consult your tax advisor for specific rules related to qualified charitable distributions.



ARIZONA HUMANE SOCIETY