



# Wisconsin United Methodist Foundation, Inc.

750 Windsor Street, Suite 305, Sun Prairie, Wisconsin 53590  
Phone 1-888-903-9863 or 608/837-9582, FAX 608/837-2492, e-mail: [wumf@wumf.org](mailto:wumf@wumf.org)  
ERIC P. CHURAN THOMAS R. SCHAEFER  
PRESIDENT VICE PRESIDENT OF FINANCE

Dear Friends of the Foundation,

If you are 70-1/2 or older and have a Traditional or Roth IRA, you may wish to consider an IRA Rollover gift to your local church or any other United Methodist ministry of your choosing from your IRA. You may make a direct charitable gift to fund your church's operating budget, a special project or you may use your IRA gift to establish a permanent endowment fund to benefit your church in perpetuity.

Please see the sample letter attached. It is a fill-in-the Microsoft Word document that you may use as a template or as is. It does require the federal tax ID number for your church or any other charity you wish to benefit. Please call your church treasurer for the church's Treasury Tax ID Number.

When you have completed and signed the letter, send it to your IRA Custodian and ask them to make a direct transfer of funds from your IRA to your local church or favorite charity. Be sure that the check is made payable to the church or charity, even if it is mailed to you. This will reduce the amount of your **Required Minimum Distribution** that is taxable to you (up to \$100,000).

Please note that since you are making this gift from your IRA, you will not receive a charitable deduction.

We encourage you to consult your IRA custodian or financial planner to assist you. The Wisconsin United Methodist Foundation is available to assist you, as well. Please call us toll-free at 1-888-903-9863 or email us at [wumf@wumf.org](mailto:wumf@wumf.org). If you prefer to channel your IRA rollover gift through the Foundation office to your local church or a number of United Methodist ministries, we are happy to do so. Please call the Foundation!

Sincerely,

Eric P. Churan  
President