Venice Family Clinic

GIFTS OF IRA/RETIREMENT ASSETS

Create a lasting legacy in a tax-smart way

Retirement assets can be among your most heavily taxed assets if left to individuals. Using them to support Venice Family Clinic can reduce taxes and increase the impact of your giving while preserving other assets for your loved ones.

WHY CONSIDER THIS GIFT?

- **Create lasting impact**
  Direct your gift to support compassionate, high-quality care for individuals and families who need it most – today and for generations to come.
- **Maximize tax efficiency**
  - Make a gift from your IRA to satisfy your Required Minimum Distribution (RMD)
  - Reduce or avoid income and estate taxes on retirement assets
- **Maintain flexibility**
  - Preserve other assets for family or heirs
  - Make a meaningful gift using funds you may not need

Your gift.
Their future.
Contact us to learn how your gift can make a lasting difference.

WAYS TO GIVE

Make a qualified charitable distribution

- Transfer up to $100,000 annually from your IRA if you are age 70 ½ or older
- If you are age 73 or older, satisfy your required minimum distribution (RMD)
- Avoid income tax on the amount transferred
- Direct funds to Venice Family Clinic

Name Venice Family Clinic as a beneficiary

- Designate the Clinic as a beneficiary of your retirement account
- Allow the full value of the asset to pass tax-free to support your chosen purpose

Make a gift during your lifetime

- Withdraw funds from your retirement account after age 59 ½
- Make a charitable gift and claim a deduction if you itemize
- Offset income with charitable contributions, within IRS limits
- Reduce the size of your taxable estate

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