

Sherrie A Mueller

From: Lamar University Office of Gift and Estate Planning <smueller@GiftPlanning.lamar.edu>
Sent: Friday, February 11, 2022 4:05 PM
To: Sherrie A Mueller
Subject: Discover the Benefits of the IRA Charitable Rollover

Rollover

Your IRA for Good

- Pay no income tax on your gift
- Support Lamar University
- Build your charitable legacy
- Use your IRA in the way you want



YOU CAN
DIRECT UP TO
\$100,000

70½
OR OLDER



Dear John,

By taking a distribution from your IRA this year, you will likely pay more in taxes and may even reach a higher tax bracket. **Rolling over** part of your IRA's required minimum distribution ("RMD") to the Lamar University Foundation can help reduce your tax bill while supporting LU!

If you are **70½** or older, you can make a gift of up to **\$100,000** this year from your IRA. You can initiate a Charitable Rollover from your IRA through our [website](#) or by contacting your IRA administrator. **Please also inform us of your plans.**

Compare the impact of taking your RMD versus the benefits of making an IRA Charitable Rollover to Lamar University Foundation.

Taking Your RMD

- Pay income tax on your distribution
- You may not need or want the money
- Your tax dollars go to Washington
- You are limited by the RMD rules



Making an IRA Charitable Rollover to the Lamar University Foundation

- Pay no income tax on your gift
- Support Lamar University
- Build your charitable legacy
- Use your IRA in the way you want

Lamar University, P.O. 10011, Beaumont, TX 77710

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