



IRA Distributions

If you are 70 1/2 or older, you may want to consider the tax benefits of gifting from your Individual Retirement Account (IRA) to CASA of Brown County as a Qualified Charitable Distribution (QCD). A QCD is a non-taxable distribution and also counts toward your annual Required Minimum Distribution (RMD), if applicable.

Tax-free distributions are allowed for individuals age 70 1/2 or older if made directly from their IRAs to qualified charities. The annual limit is \$105,000 per taxpayer. CASA of Brown County is a qualified charity. Our federal tax identification number is 20-0476117.

If you would like to continue your generous gifting as part of your legacy, you can also name CASA of Brown County as a beneficiary of your IRA. This is as simple as working with your provider and updating or adding CASA of Brown County to your beneficiary designations.

Please consult with your tax/financial adviser for more information.