

A GIFT OF RETIREMENT PLAN ASSETS



RMHC
Atlanta

Keeping families close™

Atlanta RMHC's mission is to nurture the health and well-being of children and families.

Platinum
Transparency
2022

Candid.



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Note: This information is not intended as legal or tax advice. To ensure the best match for your individual goals and charitable vision, please consult with an attorney or professional advisor.

A TAX-WISE STRATEGY

While 401(k)s, IRAs and other retirement plans are excellent vehicles for accumulating assets for your use during retirement, much to many people's surprise, they are a far less attractive way to pass an inheritance to loved ones. Here's why:

THE TAX BURDEN

Retirement plan assets are subject to heavy income and possible estate taxes when you name anyone other than your spouse as a beneficiary. These taxes can deplete a significant percentage of your hard-earned savings — leaving less for your heirs than you had hoped.

A CHARITABLE SOLUTION

If you would like to include a gift to help children and families through your estate, consider the tax-smart strategy of naming **Atlanta Ronald McDonald House Charities** the beneficiary of all or a part of your retirement plan assets and leaving other less-taxed assets to your heirs. Because of our tax-exempt status, the full value of your retirement plan assets make a difference in the lives of sick children.

STEPS TO TAKE TO MAKE YOUR GIFT

Donating retirement plan assets is easy. And if you need to change or revoke your gift at any point during your lifetime, you can. Simply take these steps:

1. Contact your retirement plan administrator for a change-of-beneficiary form
2. Decide what percentage (1-100) you would like us to receive.
3. Name Atlanta RMHC (EIN 58-1295754) and the gift percentage on the form.
4. Return the form to your plan administrator.
5. Contact **Marissa Greider** to let Atlanta RMHC know of your plans.

How It Works

