IRA Charitable Rollover

Take advantage of a simple way to benefit the St. Louis Symphony Orchestra and receive tax benefits in return.

To Qualify

• You must be 70 ½ years of age or older
• Transfers must be made directly from your IRA account
• IRA gifts cannot be used to fund a gift annuity, a charitable remainder trust, a donor advised fund, or a private foundation

Tax Benefits

• Individuals may transfer up to $100,000 each calendar year
• Transfers are excluded from gross income for federal income tax purposes
• You do not receive a charitable deduction
• The gift will count toward your minimum distribution requirement

This giving opportunity can be most attractive if you do not itemize your deductions.

To learn more, contact Jaclyn Stewart-Strothmann at 314-286-4190 or jaclyns@slso.org.

St. Louis Symphony Orchestra
Stéphane Denève : Music Director