**STEPS TO OBTAIN A TAX-FREE ROLLOVER FROM**

**AN INDIVIDUAL RETIREMENT ACCOUNT**

**TO BENEFIT**

**UNITED WE BUILD CAMPAIGN**

Under the terms of the Charitable IRA Legislation individuals over 70 ½ may transfer up to $100,000 per individual from an Individual Retirement Account (IRA) to a qualified public charity free of any tax. Following are steps for you to follow:

1. Be sure to leave as much time before the end of the tax year as possible to complete the gift.
2. If your qualified retirement assets are held in a defined contribution plan other than an IRA, you must first roll your plan (or at least the amount you wish to give) into an IRA in order to qualify for the rollover to United We Build. This step is relatively easy and can be accomplished by contacting your retirement plan administrator, but it does require additional time to complete.
3. Once the assets you wish to give are in an IRA, contact your plan administrator in *writing*, requesting a transfer from the IRA to United We Build. Your request should note your plan account number, the amount you wish to transfer, the name *United We Build*, the School’s/Church’s **Federal Tax ID number**, **XX-XXXXXXX**, and a statement specifying that you want the gift sent to the attention of Jim Klein (see contact information below). Ask the plan administrator to identify you as the IRA owner when the transfer is made.
4. Most important is that you should request that the check be made payable directly to United We Build and *not* to you.
5. For additional information please contact:

Jim Klein

Title

Marquette Catholic Schools

Address

City, State Zip

Phone number/s

Email