

All For
HEALTH AND HEALING



Charitable IRA Rollover

Become a partner in transforming healthcare and healing by making an IRA rollover gift to Henry Ford Health System. Donors just like you have made a lasting difference in the Henry Ford programs and services that are most meaningful to them. Your thoughtful generosity can embolden superior, seamless **patient-centered care**, inspire **research and innovation**, galvanize leading-edge **education and training**, and help power key **community health and wellness programs**.

YOUR BENEFITS:

Estate gifts are simple and straightforward, giving you the chance to make a transformational and lasting impact at HFHS, while also providing flexibility to adjust your plans as needed.

- **Gain** significant tax benefits while helping others.
- **Fulfill** your annual required minimum distribution.
- **Make** annual tax-free transfers of up to \$100,000 each year.
- **Impact** patient care now in areas that matter to you.

Example: Tax treatment of \$100,000 IRA assets left to heirs in comparison to those assets left to HFHS.

	Initial amount	Estate tax	Net after estate tax	Income tax	Net after income tax	Net % after tax
To Heirs	\$100,000	(\$40,000)	\$60,000	(\$24,000)	\$36,000	36%
To HFHS	\$100,000	\$0	\$100,000	\$0	\$100,000	100%

YOUR STEPS TO MAKING A CHARITABLE GIFT:

Step 1: The criteria

IRA owners must be 70 ½ or older to make a direct, tax-free transfer of up to \$100,000 a year from their individual retirement account to Henry Ford Health System.

*****If you have retirement assets in a 401k, 403b etc., you must first roll those funds into an IRA, and then you can direct the IRA administrator to transfer the funds to HFHS.***

Step 2: Make a lasting impact

Think about the area(s) where you would like to make a meaningful difference. Perhaps it's cancer care, or supporting research initiatives. Direct your gift to a cause you're passionate about.

Step 3: Transfer your IRA funds

Here is sample language you can use in a letter or email:

Please accept this communication as my request to make a qualified charitable contribution from my Individual Retirement under Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986, and made permanent under the Consolidated Appropriations Act of 2016. My account Number is: **[insert account number]**

Please issue a check in the amount of \$_____ payable to Henry Ford Health System.

Henry Ford Health System Development Office
One Ford Place, 5A
Detroit, MI 48202

Step 4: Let us know

We want to say thank you and ensure that your gift is used in accordance with your wishes.

WE'RE HERE TO HELP

If you need help or have questions, please don't hesitate to be in touch:



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Development Office
One Ford Place, 5A
Detroit, MI 48202
Henryford.com/Development

Estate Gifts at a Glance:

Youngest Donor - 29

Oldest Donor - 101

Gift Range - \$1-\$8 million

Median Bequest Intention - \$27,600

Median Bequest Realized - \$20,000

Total Legacy Society Members - 613

More than \$150 million given to Henry Ford Health System in Estate Gifts over the past 60 years.

"I used my gift to establish a permanently endowed fund for resident education. It's satisfying to work with residents and see them grow, and to be able to contribute to that through this fund."

- Gaylord Alexander, M.D., Anesthesiology



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