

OPPORTUNITY

*to create a legacy
and enhance your security*

EASY TO DO, DIFFICULT TO PASS UP

Making a gift from your IRA is as simple as contacting your IRA administrator and requesting that a transfer be made directly from your IRA to Berry.

If the funds are being sent by check, be sure to provide this address:

Berry College
Attn: Helen Lansing
2277 Martha Berry Hwy.
Mount Berry, GA 30149-0069

For wire transfers, your IRA administrator will need the following details:

Financial Institution

Truist
Institutional Advisory Services
303 Peachtree Street, 15th Floor
Atlanta, GA 30303

Wire Transfer Instructions

ABA Routing/Transit Number:
061000104
GL Account Number:
9088000038
GL Account Name:
Institutional Advisory Services (IAS)
FFC Trust Account Name:
Berry College Inc./Endowment
FFC Trust Account Number:
1192010
Donor Name:
*(to be completed by your
IRA administrator)*



IRA CHARITABLE ROLLOVER

Support Berry students, secure important tax savings

Berry supporters 70½ and older are familiar with the initials RMD — Required Minimum Distribution. Once you reach that age, the IRS requires you to withdraw a certain amount from your IRA each year (with the exception of the 2020 COVID exemption) whether you need the funds or not. And you pay income tax on every distribution you take. For many IRA account holders, the taxes can be a significant and undesirable annual burden.

REDUCE TAXES, INCREASE IMPACT

The IRA charitable rollover enables you to transfer up to \$100,000 from your IRA directly to Berry. You pay no taxes on the transfer, and every dollar of your gift provides access and opportunity for Berry students (in whatever way you see fit). You may also count the gift against your RMD, lowering your income and taxes for the year in which the rollover is completed. Thus, you:

- Pay fewer taxes
- Reduce/eliminate your RMD
- Help Berry students

MAJOR GIFT, MINOR EFFORT

Many alumni and friends are discovering that IRA rollover gifts are an easy way to make a big difference in the lives of Berry students. You might also consider designating Berry as a beneficiary of your IRA.

Contact Helen Lansing, Berry's senior planned giving officer, at 706.378.2867 or hlansing@berry.edu for more details.

[ALWAYS BERRY.COM/PLANNEDGIVING](https://www.alwaysberry.com/plannedgiving)