



## A Note About Year-End Giving

**It's time to start thinking about year-end giving! We would like to share with you some easy ways you can donate to NAMI Dane County in honor of the holiday season.**

### **Request a Donation Given on Your Behalf**

If you already have everything you need and are having a hard time putting together that gift list - simplify! Tell friends and family that they can donate to NAMI Dane County on your behalf by donating online at [www.namidanecounty.org](http://www.namidanecounty.org) or sending a check to 6400 Gisholt Dr. Suite 203, Monona, WI 53713.

### **The Gift of Stocks or Securities**

It's important to notify NAMI Dane County when you intend to make a gift of securities with the details of your gift (name of stock, number of shares). First, notify your broker that you wish to make a gift to NAMI Dane County. You will need the following information:

**Custodian:** Charles Schwab & Co., Inc.

**Broker:** Park Capital Management LLC

**Contact:** Alyssa Thompson 608-218-5567

[athompson@parkcapitalmgt.com](mailto:athompson@parkcapitalmgt.com)

**Account Name:** NAMI Dane County

**Account #:** 1728-7545

**DTC #:** 0164

### **Planned Giving**

- Naming NAMI Dane County as the beneficiary of your IRA, life insurance, and/or will.
- Creating a Charitable Remainder Trust (CRT)

### **Qualified Charitable Distributions (QCD) from your IRA**

A QCD is a direct transfer of funds from your IRA custodian, payable to a qualified charity. If you are 70½ or older you may also be interested in a way to lower the income and taxes from your IRA withdrawals.

### **Benefits of an IRA Charitable Rollover**

- Avoid taxes on transfers of up to \$100,000 from your IRA to our organization
- May satisfy your required minimum distribution (RMD) for the year
- Reduce your taxable income, even if you do not itemize deductions
- Make a gift that is not subject to the deduction limits on charitable gifts
- Help further the work and mission of our organization

### **How an IRA Charitable Rollover Gift Works**

- Contact your IRA plan administrator to make a gift from your IRA to us.
- Your IRA funds will be directly transferred to our organization to help continue our important work.
- Please note that IRA charitable rollover gifts do not qualify for a charitable deduction.