**Letter to support S. 2750, The CHARITY Act:**

Dear Senator:

On behalf of **[insert name of organization if there is one],** we are **[or I am]** seeking your support to expand the IRA Charitable Rollover (“rollover”), a proven charitable giving incentive, by co-sponsoring **the bipartisan CHARITY Act (S. 2750) which would expand the rollover for donor-advised fund contributions.**

The existing IRA Charitable Rollover has been an overwhelming success as a giving incentive, helping many of America’s charities provide needed services at a time of increasing demand and when fewer resources are available from government sources. In a little over eight years, Jewish Federations throughout the country have received **almost $40 million** from IRA charitable rollover contributions. These gifts have helped Federations to accelerate capital campaigns to finance new construction projects as well as maintain vital social programs, among other worthwhile projects. In addition, many donors have taken advantage of the IRA Charitable Rollover to fund endowments for their annual Federation campaign gift, the charitable lifeblood that funds current budgets and keeps federations and affiliated agencies in operation.

We urge you to support S. 2750, bipartisan legislation that would expand the rollover to permit contributions to donor-advised funds. A donor-advised fund is a charitable giving vehicle established through an irrevocable contribution to an account owned and maintained by publicly-supported charitable organization such as a Jewish federation or affiliated Jewish community foundation. Donor-advised funds permit a donor or donor-advisor to retain advisory privileges over how the funds are distributed to charity or how the account is invested. Collectively, the JFNA system holds almost $6 billion in donor-advised funds and authorizes charitable distributions exceeding $1 billion annually from such funds. These distributions are vital sources of support for Jewish and non-Jewish charitable organizations, many of which provide services to the most vulnerable among us during these continuing difficult economic times.

Supporting this bipartisan effort to expand the rollover through the use of another proven giving incentive will be an important statement by Congress in support of the charitable sector.

Sincerely yours,

**Letter to support H.R. 4907, The Grow Philanthropy Act:**

Dear Representative:

On behalf of **[insert name of organization if there is one],** we are **[or I am]** seeking your support to expand the IRA Charitable Rollover (“rollover”), a proven charitable giving incentive, by co-sponsoring **the bipartisan Grow Philanthropy Act (H.R. 4907) which would expand the rollover for donor-advised fund contributions.**

The existing IRA Charitable Rollover has been an overwhelming success as a giving incentive, helping many of America’s charities provide needed services at a time of increasing demand and when fewer resources are available from government sources. In a little over eight years, Jewish Federations throughout the country have received **almost $40 million** from IRA charitable rollover contributions. These gifts have helped Federations to accelerate capital campaigns to finance new construction projects as well as maintain vital social programs, among other worthwhile projects. In addition, many donors have taken advantage of the IRA Charitable Rollover to fund endowments for their annual Federation campaign gift, the charitable lifeblood that funds current budgets and keeps federations and affiliated agencies in operation.

We urge you to support H.R. 4907, bipartisan legislation that would expand the rollover to permit contributions to donor-advised funds. A donor-advised fund is a charitable giving vehicle established through an irrevocable contribution to an account owned and maintained by publicly-supported charitable organization such as a Jewish federation or affiliated Jewish community foundation. Donor-advised funds permit a donor or donor-advisor to retain advisory privileges over how the funds are distributed to charity or how the account is invested. Collectively, the JFNA system holds almost $6 billion in donor-advised funds and authorizes charitable distributions exceeding $1 billion annually from such funds. These distributions are vital sources of support for Jewish and non-Jewish charitable organizations, many of which provide services to the most vulnerable among us during these continuing difficult economic times.

Supporting this bipartisan effort to expand the rollover through the use of another proven giving incentive will be an important statement by Congress in support of the charitable sector.

Sincerely yours,

**Letter to support H.R. 5171 The Legacy IRA Act:**

Dear Representative:

On behalf of **[insert name of organization if there is one],** we are **[or I am]** seeking your support to expand the IRA Charitable Rollover (“rollover”), a proven charitable giving incentive, by co-sponsoring **the bipartisan Legacy IRA Act (H.R. 5171) which would expand the rollover for charitable life-income programs such as charitable gift annuities or charitable remainder trusts funded by rollover contributions to qualified charities.**

The existing IRA Charitable Rollover has been an overwhelming success as a giving incentive, helping many of America’s charities provide needed services at a time of increasing demand and when fewer resources are available from government sources. In a little over eight years, Jewish Federations throughout the country have received **almost $40 million** from IRA charitable rollover contributions. These gifts have helped Federations to accelerate capital campaigns to finance new construction projects as well as maintain vital social programs, among other worthwhile projects. In addition, many donors have taken advantage of the IRA Charitable Rollover to fund endowments for their annual Federation campaign gift, the charitable lifeblood that funds current budgets and keeps federations and affiliated agencies in operation.

We urge you to support H.R. 51771, bipartisan legislation that would expand the rollover to permi tax-free IRA rollovers for gifts that benefit charities and provide taxable retirement income—charitable life-income plans such as charitable gift annuities and charitable remainder trusts—for the donors.  Many IRA owners want to make charitable gifts, but also need retirement income. The life-income IRA rollover is a way for donors of average resources to combine charitable gifts with retirement income. At the donor’s death, the assets in the plan are owned outright by the qualified charity. Under the authorized life-income plans, the IRA owners will be taxed on income received at ordinary income tax rates. Many Jewish federations currently operated life-income plans and expansion of the rollover to allow such distributions should also permit additional donors to take advantage of this well-established charitable giving vehicle while at the same time receiving needed retirement income.

Supporting this bipartisan effort to expand the rollover through the use of another proven giving incentive will be an important statement by Congress in support of the charitable sector.

Sincerely yours,