

## **Good news!**

### **The IRA Charitable Rollover is back!**

In tax years 2008 and 2009, an owner of a traditional or Roth IRA may “roll over” a charitable distribution directly to a public charity, including the San Francisco Symphony.

Some of the major features:

- The donor must be at least age 70½
- The distribution is not included in taxable income and there is no income tax charitable deduction
- The rollover will count toward the IRA owner's mandatory withdrawal amount
- Can roll over up to \$100,000 each year.

The San Francisco Symphony can provide you a form for your IRA manager in order to make this transfer to the Symphony. To learn more about this exciting charitable giving opportunity or other gift planning options, please contact Stephen Steiner, Director, Gift Planning, at (415) 503-5445, or email Stephen at [ssteiner@sfsymphony.org](mailto:ssteiner@sfsymphony.org).