PROCESS:

• Request a copy of the Change of Beneficiary Form from your IRA or retirement plan administrator.

• Name Dress for Success South Central PA as the full or partial beneficiary of the plan’s balance.

DONOR BENEFITS:

• If balance is designated to heirs, much will be lost through income and estate taxes. If balance is designated to a charity, the full amount (tax exempt) will be transferred.

• Continue your regular lifetime withdrawals.

• Maintain the flexibility to change beneficiaries.

• The portion given to Dress for Success South Central PA will qualify for income tax, inheritance tax, and federal and state estate tax deductions.

CONTACT YOUR IRA OR RETIREMENT PLAN ADMINISTRATOR ABOUT THE BENEFITS AND TAX IMPLICATIONS OF DONATING THROUGH A QUALIFIED RETIREMENT PLAN.