

## Tax-Favored Charitable Gifts

In order to make a charitable gift in **2025** for federal income tax purposes, your gift must be completed before **December 31, 2025**. There are many ways to support a qualified organization such as the Abbey of the Hills Inn & Retreat Center. Below are two tax-advantaged options that may be beneficial to you.

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### IRA Qualified Charitable Distribution (QCD)

#### Benefits of an IRA Qualified Charitable Distribution

If you are age **73 or older** and required to take a Required Minimum Distribution (RMD) from your IRA, but do not need the fund, the Abbey of the Hills would be most grateful to receive part or all of your RMD. You may also choose to make an IRA gift **in excess of your RMD** if you wish. In addition, individuals age **70½ or older** may make Qualified Charitable Distributions (QCDs) regardless of whether they are yet required to take RMDs.

QCDs must be made by **direct transfer** from your IRA to the Abbey and must be completed by **December 31** each year.

- Avoid taxes on transfers of up to **\$108,000** from your IRA to the Abbey of the Hills. You do not have to pay income taxes on IRA Distributions that are directly transferred to a qualified charity.
- Make a gift that is **not subject to charitable deduction limits**.
- Help further the work and mission of the Abbey of the Hills.

#### How an IRA Qualified Charitable Distribution gift works

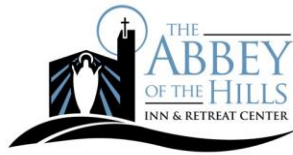
- Contact your IRA plan administrator to request a direct transfer from your IRA to the Abbey of the Hills. Many brokerage firms allow you to request this distribution online.
- Your IRA **Qualified Charitable Distribution** will be transferred directly to the Abbey of the Hills to support our mission and programs.
- Please note that IRA **Qualified Charitable Distribution** gifts **do not qualify for a charitable income tax deduction**.
- Please ask your IRA administrator to include your **full name and address** with the gift information so we can properly acknowledge your generosity.
- The Abbey of the Hills Inn and Retreat Center is a registered 501(c)(3) non-profit organization EIN Number: 46-4176934. Our address and mailing information is: PO Box 38, 46561 147th Street, Marvin, SD 57251

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*“The Abbey of the Hills fosters the **rediscovery of peace.**”*

PO Box 38 | 46561 147th Street | Marvin, SD 57251

605-398-9200 ex. 113 | [margaretartz@abbeyofthehills.org](mailto:margaretartz@abbeyofthehills.org)



## Gifts of Stock

A gift of long-term appreciated, publicly traded stock may entitle you to an income tax charitable deduction for the **fair market value** of the stock on the date of the gift—and may also help you **avoid capital gains tax**. In many cases, donating securities directly to a qualified organization provides greater tax benefits than selling the securities and donating the cash proceeds. We recommend consulting your tax advisor or brokerage firm for guidance specific to your situation.

### To transfer stock to the Abbey of the Hills Inn & Retreat Center:

1. **Instruct your broker** to transfer shares of stock using the following information:

**Broker:** Raymond James

**Contacts:** Sallie Doty or Marc Schmitz, 605-224-2636

**Address:** 208 W Capitol Ave, Pierre, SD 57501

**Account Number:** 4347N122

**Account Name:** The Abbey of the Hills Inn & Retreat Center

2. **Notify the Abbey of the Hills:**

Contact **Margaret Artz, Chief Development Officer**, at 605-398-9200 ext. 113 or by email at [margaretartz@abbeyofthehills.org](mailto:margaretartz@abbeyofthehills.org) to ensure we are aware of your pending stock transfer.

Upon receipt, we will issue a **stock transfer receipt**. Your gift will be valued at the **fair market value** of the stock—defined by the IRS as the average of the **high and low trading prices** on the date of transfer.

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We are deeply grateful for your generosity and partnership as we work together to advance the Abbey of the Hills' mission—providing a sacred space where individuals can rediscover peace and deepen their connection with God.

If you have any questions, please reach out to the Development Office at 605-398-9200 ext. 113.

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