



IRA Giving: The Next Wave of Philanthropy

By 2030, the entire Baby Boomer generation will be age 65 or older. As these donors approach retirement, fundraising professionals need to be mindful of a new way for them to give to their organizations – the Qualified Charitable Distribution from an Individual Retirement Arrangement. However, many are not aware of how QCDs work and why they may be advantageous to donors to use for their philanthropic investments.

In this session, participants will learn to maximize this next wave of philanthropy. We'll cover what QCDs are, how they work, and why they should be promoting this type of giving to their donors.

Learning Outcomes:

- Learn how eligible donors can give to your organization via QCDs, including recent changes via the Secure 2.0 Act which allow for split interest (life income) gifts.
- Determine how to market this opportunity to donors of all net worth levels, through both existing methods in your organization and additional methods targeted towards appropriate segments of donors.
- Explore ways to convert loyal QCD donors to become legacy donors and include your organization in their estate plans.
- Explore ways to convert loyal QCD donors to become legacy donors and include your organization in their estate plans.