

_____, 2019

The Honorable Mike Kelly
House Ways & Means Committee
U.S. House of Representatives
1707 Longworth House Office Building
Washington, DC 20515

Dear Rep. Kelly,

[Sample: On behalf of the diverse local charitable organizations which Pittsburgh Planned Giving Council represents in your District, thank you for your past support of our work.] We respectfully request your support for the bipartisan Legacy IRA Rollover bill (H.R. 1337). We would also request that you co-sponsor H.R. 1337 and include it when your Ways & Means Committee marks up other legislation.

The Legacy IRA Rollover bill encourages charitable giving by enabling seniors to make tax-free contributions from their individual retirement accounts (IRA) to charities through life-income plans. The senior's annual retirement income from the life-income plan is fully taxed. This legislation would encourage more charitable giving from middle-income seniors. It is also of great significance to the charitable organizations who work hard, many through volunteers, to help the most vulnerable in our community.

All of our charities depend on private giving, including gift planning, to carry out charitable services. A few years ago, when the IRA Charitable Rollover provision was made permanent in the PATH Act, we all saw a significant increase in charitable giving from IRAs. According to a recent qualitative national survey, charitable giving from IRA Charitable Rollover contributions rose 73 percent from 2017 to 2018. We believe the Legacy IRA Rollover bill is simply another option to build on the IRA Charitable Rollover and would have a much larger impact in terms of charitable giving.

Thank you for your past leadership on behalf of the charitable community in our community, and again, we encourage you to support the Legacy IRA Rollover bill and stand ready to support you in your efforts. Should you have any questions, please feel free to contact either of the following volunteers of the Pittsburgh Planned Giving Council: Jack Owen, Esq. (412-765-1020 or jowen@owenlawllc.com) or Gordon Fraser (412-818-3799 or gcf5@pitt.edu).

Sincerely,