

A Tax-Wise Way to Support Libertas Network

One of the easiest ways to make a lasting gift to Libertas Network may be through an asset you have already set aside for the future.

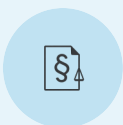
Retirement accounts such as IRAs, 401(k)s, 403(b)s, Keoghs, and other tax-deferred plans can be especially strong candidates for legacy giving because they often carry built-in tax consequences. In many cases, funds left in these accounts have not yet been taxed. When they pass to individual heirs, those heirs may owe income tax as the money is withdrawn.

By contrast, because Libertas Network is a tax-exempt organization, a gift from your retirement account can be used fully for the work you intended: helping families raise children who understand freedom, cherish it, and are prepared to carry it forward.

That can make retirement assets a powerful part of your overall estate plan. You may choose to leave other assets to family members or friends while naming Libertas Network as the beneficiary of part or all of a retirement account. Depending on your circumstances, this approach may reduce the tax burden on your heirs while allowing you to make a meaningful gift to the principles you care about most.

Current rules generally require many non-spouse heirs to withdraw inherited retirement account funds within 10 years. For some heirs, those withdrawals can increase taxable income during that period and may affect their overall tax situation.

Naming Libertas Network as a beneficiary is simple. Contact your plan administrator or visit their website to complete a beneficiary designation form. You can name Libertas Network as the sole beneficiary, a partial beneficiary, or a contingent beneficiary.



Making Libertas Network a beneficiary of your retirement account qualifies you for membership in the **Libertas Legacy Society**, a special group of supporters helping to keep the torch of liberty burning for future generations.

DON'T WANT TO WAIT TO GIVE FROM YOUR IRA?

If you are age 70½ or older, you may also be able to make a Qualified Charitable Distribution, or QCD, directly from your IRA to a qualified charity like Libertas Network. The annual QCD limit is indexed for inflation; for 2026, the limit is \$111,000 per individual.

A QCD can count toward your required minimum distribution for the year of your gift. It is also generally excluded from federal taxable income, which means you may receive a tax benefit even if you take the standard deduction.

While QCDs do not qualify for Legacy Society membership, they are a simple and tax-smart way to support Libertas Network's work today.

This information is for educational purposes only and should not be regarded as legal or tax advice. We urge you to talk with your financial advisors about your plans and would be glad to be of assistance in those conversations.



To speak with someone on our team about legacy giving at Libertas Network, email us at legacy@libertas.org or call (801) 901-0310.

