



Planned Giving: RETIREMENT ASSETS

Take action today ... support Sojourners in the future

FACTS ABOUT RETIREMENT ASSETS:

- Retirement gifts cost nothing now. By leaving a retirement gift to Sojourners, you gain the satisfaction of knowing you have provided for the Sojourners community—past, present, and future.
- You retain control of your assets.
- Your loved ones receive relief from federal and state taxes.
- 100% of your gift benefits Sojourners.

RETIREMENT SAVINGS CAN INCLUDE:

- Individual retirement accounts (IRAs)
- 401(k) or 403(b) plans
- Private pension plans
- State, local, and federal government pension plans
- Annuities
- Certain taxable money earmarked as retirement (e.g., inherited stock)

ADDITIONAL FACTS ABOUT RETIREMENT ASSETS:

- If you name Sojourners a beneficiary of your retirement plan, our mission and work will receive the full value of what you give (as opposed to some of that amount going to the state and Sojourners receiving the remainder).
- Sojourners can provide you an instruction letter to complete and submit to your fund administrator.

This information is not intended as tax or legal advice. Laws and regulations governing all gifts vary by state. We recommend you consult your financial advisers to learn how a gift would work in your circumstance.

For more on legacy giving, contact:
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