

Fabulous Fridays

A Series of 8 Estate/Legacy Planning Webinars

Using an IRA as an Estate/Legacy Planning Tool and the Montana Endowment Tax Credit as a Living Legacy Tool

March 11, 2022

Resources

1. **Save Montana Income Taxes with a Charitable Gift Annuity: A Legacy Qualifying for the Montana Endowment Tax Credit (METC).** (MSU Extension MontGuide) [\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)
Explains how charitable gift annuities could be used to meet both the altruistic and tax savings goals of Montanans.
2. [Make a gift with an IRA distribution and reduce income tax liability](#) (Montana State University Alumni Foundation)
3. [IRA Required Minimum Distribution Worksheet](#) (*Use only if your spouse is the sole beneficiary of your IRA and is more than 10 years younger than you*)
4. [IRA Required Minimum Distribution Worksheet](#) (*For everyone else if the worksheet above doesn't apply*)
5. [IRS Publication 590-A, Contributions to Individual Retirement Arrangements](#)
6. [IRS Publication 590 B, Distributions from Individual Retirement Arrangements](#)
7. [2022 Uniform Table for calculating IRA Required Minimum Distribution](#)
8. [IRS Publication Distributions from Individuals Retirement Arrangements](#): IRS has the 2022 tables even though it states for use in preparing 2021 returns. Appendix B: Uniform Lifetime Table 2022 (Draft)

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