

IRA Gift Instructions for Direct QCD Gift to a Qualified Charity

Evangelical Free Church of America (EFCA)
Tax ID Number: 41-0721672

Date: ____ / ____ / ____

To: **IRA CUSTODIAN:** _____

ADDRESS: _____

Please accept this letter as my official request to make a Qualified Charitable Distribution (QCD) from my Individual Retirement Account (IRA) # _____.

Federal law permits the holder of an IRA or Roth IRA who is 70 ½ or older to make a QCD gift directly from their IRA to a qualified charity such as the EVANGELICAL FREE CHURCH OF AMERICA (EFCA). The EFCA is a registered 501(c)3 non-profit organization.

Please issue and mail a check in the amount of \$_____ directly to the EFCA.

EFCA Donor Services
901 E 78th Street
Minneapolis, MN 55420-1300

Thank you for your timely assistance in the matter to fulfill my charitable intentions.

Sincerely,

Signature: _____ Home Phone _____

Printed Name: _____ Cell Phone _____

Address: _____

City: _____ State: _____ Zip code: _____

Email: _____

Notification to EFCA to expect a QCD Gift from IRA

Mr. Lanny L. Harris, Gift Planner
EFCA Foundation
901 East 78th Street
Minneapolis, MN 55420

Dear Mr. Harris:

I am pleased to inform you that I have directed the custodian of my Individual Retirement Account (IRA) to make a Qualified Charitable Distribution (QCD) from my IRA to the Evangelical Free Church of America (EFCA). The information concerning my IRA and my QCD gift are described below.

IRA Plan Custodian Name: _____

Distribution Amount by check: \$_____

If stock, please watch for the following securities to EFCA transferred by DTC (please specify # shares, company, and approx. value): _____

Please use my gift to strengthen the mission and ministries of the Evangelical Free Church of America (e.g., for EFCA Fund, global missions, national ministries, EFCA missionaries, local EFCA churches) as follows:

\$_____ (or _____ %) for _____ (purpose #1)

\$_____ (or _____ %) for _____ (purpose #2, if applicable)

\$_____ (or _____ %) for _____ (purpose #3, if applicable)

\$_____ (or _____ %) for _____ (purpose #4, if applicable)

It is my intention that this gift from my IRA comply with the QCD requirements of Section 408(d) (8) of the Internal Revenue Code.

When you receive the QCD gift, please send me a contemporaneous written acknowledgment that includes the following: (1) information about the amount/value of my QCD gift, and (2) that indicates that my gift will not be placed in a donor advised fund, supporting organization, or charitable gift annuity or be eligible for a charitable income tax deduction. Please consult with your tax advisors with questions pertaining to your unique situation.

If you have any questions concerning my gift or this letter, please let me know.

Sincerely,

Donor's Name (please print): _____ Signature: _____

Address: _____ City: _____

State: _____ Zip Code: _____ Phone: _____ Email: _____