

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 directly from their IRA to a qualified charity such as the EVANGELICAL FREE CHURCH OF AMERICA (EFCA).

Please issue a check in the amount of \$ _____ payable to EFCA.

Please transfer the following securities to EFCA: _____

Instructions for cash transfers:

Issue check payable to EFCA

EFCA
ATTN: IRA Gift Team
901 E 78th Street
Minneapolis, MN 55420

Instructions for DTC transfers if transferring Securities:

Clearing Firm: Charles Schwab & Company, Inc.

DTC Number: 0164, Code 40

Account Name: Evangelical Free Church of America

Account No: 91140796

Broker Agent: Ryan Stibich (877) 296-7110

IRA Account Holder: _____

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 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 ministries of the Evangelical Free Church of America (e.g. EFCA Fund, global missions, national ministries, EFCA missionaries, local EFCA churches) by distributing it in the following way(s):

\$_____ (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: (1) this gift from my IRA comply with the QCD requirements of Section 408(d) (8) of the Internal Revenue Code; (2) that I will not be able to claim a charitable income tax deduction for my QCD gifts.

When you receive the distribution from the custodian of my IRA, please send me a contemporaneous written acknowledgement that includes the following: (1) information about the amount / value of my gift and (2) that indicates that my gift will not be placed in a donor advised fund, supporting organization, or charitable gift annuity.

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: _____