

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 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). It is my intention that the specific gift identified below be treated as a QCD and that the same be used to satisfy, in whole or in part, my Required Minimum Distribution (RMD) in the year of transfer. Thank you for your assistance with this matter.

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 Processing
901 E 78th Street
Minneapolis, MN 55420

Instructions for DTC transfers if transferring securities:

Clearing Firm: Charles Schwab & Company, Inc.
DTC Number: 0164
Account Name: Evangelical Free Church of America
Account Number: 91140796
Broker Agent: Anna Todorova (303) 296-7100 (phone)
My Donor Name: _____

Sincerely,

Signature: _____ Telephone: _____

Printed Name: _____ Email: _____

Address: _____ City _____ ST _____ Zip: _____

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. National Ministry Fund, Global Vision Partners, EFCA missionaries, local 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 this gift will be used to satisfy all or part of my annual Required Minimum Distribution (RMD); and (3) that I will not be able to claim a charitable income tax deduction for my IRA gift.

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; (2) a statement confirming that no goods or services were transferred to me in consideration for this gift; and (3) 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: _____