



## IRA Charitable Rollover Gift Form

Please return this form to your IRA trustee and instruct them to send the form and your IRA charitable rollover gift to:  
Episcopal Charities of Southeast Florida, Inc. 1750 E. Oakland Park Blvd. FL, Ft. Lauderdale FL 33334

The IRA Charitable Rollover provision of the Internal Revenue Service Code Section 408(d)(8) allows individuals who have reached age 70½ to make qualified charitable distribution, or QCD, gifts of up to \$100,000 per calendar year directly from IRAs to qualified charitable organizations. QCDs can satisfy all or part of the IRA owner's required minimum distribution and avoid treatment of the distribution as taxable income. To initiate a QCD from your IRA to the Episcopal Charities of Southeast Florida your IRA trustee will need the following information:

**Legal Name:** Episcopal Charities of Southeast Florida, Inc

**Taxpayer ID:** 65-0934414

**Permanent Address:** 1750 E. Oakland Park Blvd.

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when Episcopal Charities of Southeast Florida receives the QCD gift from my financial institution, it will provide me with a written acknowledgment of the gift date and amount, stating no goods or services were transferred to me in consideration for the gift.

Donor's Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Printed Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Gift Information: \_\_\_\_\_

IRA Gift Amount: \$ \_\_\_\_\_ IRA Financial Institution: \_\_\_\_\_