



IRA Qualified Charitable Distribution

If you are over the age of 70 1/2 you may now transfer up to \$100,000 from your IRA to the Orange Catholic Foundation. Qualified gifts from your IRA that meet the requirements below are not reportable as taxable income and the gift qualifies for your required minimum distribution (RMD) which can lower your income and taxes.

The IRA Qualified Charitable Distribution allows you to make a direct distribution from your IRA account to the Orange Catholic Foundation to benefit your favorite ministries including your parish, schools, and the Orange Catholic Foundation funds. The following conditions apply: **(1) you must be age 70 1/2 or older at the time your distribution is made, and (2) there is a limit of \$100,000 per individual per year.**

The transfer of funds must be made directly by your IRA plan administrator to the Orange Catholic Foundation.

- Who?** Donors who are at least 70 1/2 years of age or older at the time of distribution and have an IRA.
- What?** An individual owner of an IRA may instruct their IRA manager to distribute any amount up to \$100,000 directly to the Orange Catholic Foundation for the benefit of your parish, school or the Foundation without the distribution being included as taxable income. The charitable distribution will then count toward the IRA owner's required minimum distribution (RMD).
- How?** Contact your IRA custodian or representative ASAP to arrange for the proper transfer of funds from your IRA directly to the Orange Catholic Foundation. Please use the attached form to request the transfer.

The check issued from your IRA must be made payable to the Orange Catholic Foundation.

The transfer of your IRA distribution must be made directly by your plan administrator to The Orange Catholic Foundation by December 31 to qualify for that tax year.

For further information, please contact the Orange Catholic Foundation at 714.282.3021 or info@OrangeCatholicFoundation.org or visit www.OrangeCatholicFoundation.org

**Mailing Address:
Orange Catholic Foundation
13280 Chapman Avenue
Garden Grove, CA 92840**

*This information is intended to be general in nature.
Please consult with your own personal tax advisor for professional advice and further details.*



QUALIFIED CHARITABLE DISTRIBUTION INSTRUCTIONS TO PLAN ADMINISTRATOR

TO: Your IRA Plan Administrator _____

FROM: Plan Owner: _____

ADDRESS: _____

EMAIL: _____ **PHONE:** _____

ACCOUNT #: _____ **DATE:** _____

RE: Request for Charitable Distribution from Individual Retirement Account

As the owner of IRA account [_____] that is in the custody of your organization, I request that you transfer from that account the sum of [_____ \$ _____]:

Via Check:

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

Orange Catholic Foundation, Tax ID #33-0934571

For the benefit of: _____ (specify parish, school, or campaign)

Mail check to: **Orange Catholic Foundation**
13280 Chapman Avenue, Garden Grove, CA 92840

Please accept this form as my request to make a direct charitable distribution from my IRA. In your transmittal to the charity, please memorialize my name and address as the donor of record in connection with the transfer. Please copy me on your transmittal.

If you have any questions or need to contact me, I can be reached at the information listed above.

Thank you for your assistance in this matter.

Sincerely,

Signature



Orange Catholic Foundation Gift Form

I/We wish to support the mission of the Orange Catholic Foundation:

Donor Information

Mr. Mrs. Ms. Dr. Other _____

First Name(s) _____ M.I. _____ Last Name(s) _____

Street Address _____

City _____ State _____ Zip _____

Home Phone _____ Business Phone _____

FAX _____ Email _____

Your Gift

IMPORTANT: Please contact our office prior to sending cash or securities. To give securities, please visit our website at www.OrangeCatholicFoundation.org and obtain the Stock Donation Form.

I/We would like to make a one-time gift of \$ _____

I/We would like to pledge a total of \$ _____ to be paid as follows:

\$ _____ now and \$ _____ Semi-annually Quarterly Monthly

Enclosed is my check payable to Orange Catholic Foundation in the amount of \$ _____

Please charge my credit card in the amount of \$ _____

Card # _____ Exp Date _____

I authorize the above transaction: _____

Signature

Date

Designation

To: OCF Unrestricted Fund to be used where need is greatest

My/Our Donor Advised Fund Fund Name: _____

Parish or School Endowment Fund Fund Name: _____

School Tuition Assistance Fund Seminarian Education Fund

Retired Priest Fund Parishes in Need Fund

Other, please describe _____

For more information, contact the Orange Catholic Foundation at Phone 714.282.3021 or Fax: 657.206.4453
www.OrangeCatholicFoundation.org

Orange Catholic Foundation 13280 Chapman Avenue, Garden Grove, CA 92840