GIVING FROM AN INDIVIDUAL RETIREMENT ACCOUNT

CHARITABLE IRA ROLLOVER

IRA owners age 70 ½ or over can make tax-free gifts directly from an IRA to InterVarsity. These Qualified Charitable Distributions (QCD) count toward satisfying your annual Required Minimum Distribution (RMD). Each IRA owner can transfer up to $100,000 per calendar year (total to all charities), directly from his or her IRA to a charity like InterVarsity.

Benefits

- Counts toward satisfying your RMD
- Distribution does not count as income (therefore, not income tax-deductible)
- Your QCD supports the important work of InterVarsity

How to Make a Charitable IRA Rollover

Print and complete the attached sample letters. Mail the first letter to your IRA custodian and the second to InterVarsity. Keep a copy for your records.

-OR-

Contact your IRA custodian/administrator and have the funds sent directly to InterVarsity Christian Fellowship, P.O. Box 7895 Madison, WI 53707-7895. To assure proper processing/receipting:

- Provide your full name and address
- Specify that the funds are a qualified charitable distribution from your IRA
- Notify InterVarsity that the gift is coming from your IRA and include the InterVarsity ministry names(s) you want your gift to support (This information often does not get communicated to InterVarsity by your IRA custodian.)

If you have questions or need help, please contact us:

Estate & Gift Planning
InterVarsity Christian Fellowship
PO Box 7895 Madison, WI 53707-7895

Email: giftplanning@intervarsity.org
Phone: 866-404-4823, ext. 3685
Web: giftplanning.intervarsity.org/IRA
Date: ___________________

To: ____________________________________________

Name of IRA Custodian

_______________________________________________

Address

_______________________________________________

City, State, ZIP Code

Re: Request for Charitable Distribution from Individual Retirement Account

_______________________________________________

Account Number

Dear Sir or Madam,

Please accept this letter as my request to make a direct qualified charitable distribution from the account referenced above, as provided by Section 112 of the Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check payable to InterVarsity Christian Fellowship/USA in the amount of $____________. The Federal Tax ID number for InterVarsity Christian Fellowship/USA is 36-2171714.

Please mail the check directly to InterVarsity at:

   Attn: Donation Services
   InterVarsity Christian Fellowship/USA
   P.O. Box 7895
   Madison, WI 53707-7895

In your transmittal to the charity, please state my name and address as the donor of record in connection with this transfer and copy me on your transmittal. If you have any questions or need to contact me, you may call me at (_____)__________________.

Sincerely,

_______________________________________________

Signature

_______________________________________________

Print Name

_______________________________________________

Address  City  State  Zip
Date: __________________________

Attn: Donation Services
     InterVarsity Christian Fellowship/USA
     P.O. Box 7895
     Madison, WI 53707-7895

Dear Friends,

It is my pleasure to inform you that I have requested that a qualified charitable distribution from my Individual Retirement Account in the amount of $________________ be made to InterVarsity Christian Fellowship/USA by my IRA custodian, _____________________________.

Please use this gift for:

☐ the general purposes of InterVarsity Christian Fellowship/USA
☐ the InterVarsity ministry of: ____________________________
☐ see the enclosed list of my preferred ministry uses

It is my intent to comply with the requirements of Section 112 of the Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

Accordingly, upon your receipt of payment, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were provided to me by your organization as consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

If you have any questions or need to contact me, you may call me at (_____)______________.

Sincerely,

__________________________________________________________
Signature

__________________________________________________________
Print Name

__________________________________________________________
Address    City    State    Zip

InterVarsity Donor ID # (if known)