



## IRA CHARITABLE ROLLOVER INSTRUCTIONS

The Charitable IRA is now permanent for those age 70 1/2 and older. 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. Gifts made from your IRA is not reportable as taxable income and the gift qualifies for your required minimum distribution (RMD) which can lower your income and taxes.

The Charitable IRA Rollover 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, Pastoral Services Appeal (PSA), Christ Cathedral and the Orange Catholic Foundation endowment 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 our 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 714.282.3134 or [plannedgiving@OrangeCatholicFoundation.org](mailto:plannedgiving@OrangeCatholicFoundation.org) or visit [www.OrangeCatholicFoundation.org](http://www.OrangeCatholicFoundation.org)*

***Mailing Address:  
Orange Catholic Foundation  
Diocesan Pastoral Center  
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.*



## IRA ROLLOVER 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

HR 2029, the Consolidation Appropriations Act of 2016 and Sec. 408(d)(8) of the Internal Revenue Code of 1986 permits an IRA rollover direct from an IRA custodian to a qualified public charity. 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, Attn: Yolanda Wright**  
**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