



QUALIFIED CHARITABLE DISTRIBUTION FORM

www.OrangeCatholicFoundation.org

INSTRUCTIONS FOR MAKING A DIRECT IRA DISTRIBUTION TO THE ORANGE CATHOLIC FOUNDATION

Who

If you are 70 ½ years of age or older at the time of the gift, you are eligible to make a Qualified Charitable Distribution (QCD) directly from your IRA.

What

You can instruct your IRA manager to distribute any amount up to \$111,000 per person (2026 limit, indexed annually) directly to The Orange Catholic Foundation (OCF) for the benefit of a parish, school, Catholic ministry or OCF. This type of charitable gift is excluded from taxable income and may satisfy all or part of your Required Minimum Distribution (RMD).

How

Contact your IRA custodian or representative to arrange for the proper transfer of funds from your IRA directly to The Orange Catholic Foundation. Use the attached form to request the transfer.

Where

Although the check will be made payable to The Orange Catholic Foundation, you can direct your QCD distribution to benefit one or more charitable causes. Make sure to fill out the designation section on the attached form, provide a copy to The Orange Catholic Foundation and we will ensure your gift is distributed according to your wishes.

When

To qualify for the current tax year, the check must be issued by December 31.

The check issued from your IRA must be made directly by your plan administrator to The Orange Catholic Foundation.

To learn more or submit your form after contacting your IRA administrator, reach out to The Orange Catholic Foundation using the information below.

The Orange Catholic Foundation
13280 Chapman Avenue, Suite 430
Garden Grove, CA 92840

Email: Info@OrangeCatholicFoundation.org

Phone: 714.282.3021

Fax: 657.206.4453

QUALIFIED CHARITABLE DISTRIBUTION (QCD) INSTRUCTIONS TO IRA PLAN ADMINISTRATOR

To: _____
IRA Plan Administrator

From: _____
IRA Plan Owner

Address: _____

Email: _____ Phone: _____

Account #: _____

RE: Request for Qualified 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 \$ _____ to The Orange Catholic Foundation. Please issue a check of that amount to **The Orange Catholic Foundation, TAX ID 33.0934571**.

Mail check and copy of this form to: **The Orange Catholic Foundation**
13280 Chapman Avenue, Suite 430 | Garden Grove, CA 92840

Please accept this form as my request to make a Qualified Charitable Distribution (QCD) from my IRA and 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.

Sincerely,

Signature

Date

IRA PLAN OWNER DESIGNATION INFORMATION FOR THE ORANGE CATHOLIC FOUNDATION

To ensure your gift is distributed according to your wishes, fill out the chart below and provide a copy of this form to The Orange Catholic Foundation.

Program or Fund:

Dollar / Percent Split: Anonymous (Yes/No):

1.		
2.		
3.		
4.		