





## IRA TAX-FREE ROLLOVER INSTRUCTIONS

A qualified charitable distribution (“QCD”) is money that individuals who are 70½ or older may direct from their traditional IRA to eligible charitable organizations free of any tax. The tax code provision has an annual cap of \$100,000 per individual for QCDs from your IRAs. In addition, the QCD can be used to satisfy your Required Minimum Distribution.

1. Be sure to leave time before the end of the tax year to complete the gift.
2. If your qualified retirement assets are in a defined contribution plan other than an IRA, you must first roll your plan (or at least the amount you wish to give) into an IRA to qualify for the rollover to Ignatian Volunteer Corps. This step is easy and can be accomplished by contacting your retirement plan administrator, but it does require additional time to complete.
3. Once the assets you wish to give are in an IRA, contact your plan administrator in writing, requesting a transfer from the IRA to the Ignatian Volunteer Corps.
4. Your request should note
  - Your plan account number
  - The amount you wish to transfer
  - The name: Ignatian Volunteer Corps
  - IVC’s Federal Tax ID number: 52-1885486
  - A statement specifying that you want the gift sent to the attention of Mary McGinnity (see contact information below).
  - Ask the plan administrator to identify you as the IRA owner when the transfer is made.
5. The check must be made payable directly to **Ignatian Volunteer Corps** and *not* to you.
6. For additional information please contact:

Mary McGinnity  
President/CEO  
Ignatian Volunteer Corps  
740 N Calvert Street Suite 500  
Baltimore, MD 21202  
410-752-4686 Office  
301-651-0195 Cell  
mmcginnity@ivcusa.org