



## IRA charitable rollover gift form

The IRA Charitable Rollover provision of the Internal Revenue Service Code Section 408(d)(8) allows individuals who have reached age 70½ to make qualified charitable distribution, or QCD, gifts of up to \$100,000 per calendar year directly from IRAs to qualified charitable organizations. QCDs can satisfy all or part of the IRA owner's required minimum distribution and avoid treatment of the distribution as taxable income.

To initiate a qualified charitable distribution from your IRA to Habitat for Humanity/Rogue Valley, your IRA trustee will need the following information:

**Legal name:** Habitat for Humanity/Rogue Valley  
**Taxpayer ID:** 93-0971629  
**Permanent address:** PO Box 688, Medford, OR 97501

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when Habitat for Humanity/Rogue Valley receives the QCD gift from my financial institution, it will provide me with a written acknowledgment of the gift date and amount, stating no goods or services were transferred to me in consideration for the gift.

Donor's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

IRA gift amount: \$ \_\_\_\_\_ Name of IRA financial institution: \_\_\_\_\_

Please return this form to your IRA trustee and instruct him or her to send the form and your IRA charitable rollover gift to:

**Habitat for Humanity/Rogue Valley**  
**Attn: Planned Giving Department**  
**PO Box 688**  
**Medford, OR 97501**

