

## Qualified Charitable Distribution Checklist

Follow these easy steps to make your QCD gift today!

### Request a Qualified Charitable Distribution Form

Get started by requesting a distribution form from your IRA custodian or visiting [legacy.catholicextension.org/qcd](https://legacy.catholicextension.org/qcd) to access your form online.

### Complete Your Distribution Form

Print and complete your distribution form. If you would like to make a gift to Catholic Extension Society, please use the information below to designate your gift.

Catholic Extension Society  
150 South Wacker Drive  
Suite 2000  
Chicago, IL 60606

- Please note: Your information will NOT be shared with Catholic Extension Society unless you ask your custodian to notify us of your gift (see our sample letter of instruction on the following page).

### Sign Your Distribution Form

Sign and date the letter of instruction on the following page to ensure you receive acknowledgement of your gift for your tax records. If required, find a local Medallion signature location (most banks, credit unions, and other financial institutions), and sign and date the form in the presence of a Medallion guarantor.

### Mail the Form to Your Custodian

Send your distribution form and the letter of instruction on the following page to your custodian.

- It usually takes 5-10 business days from the day your form is received by your IRA custodian to the day the charity receives the check. The end-of-year period is especially busy for IRA custodians and charities. **If you are trying to complete your QCD for the current tax year, it is best to submit your form prior to December 1.**

### Let Us Know

Most IRA custodians will not identify the donor the QCD comes from, meaning that we won't know who made the gift or if there is a restriction for the gift. **If you let us know about it in advance, we can ensure your gift is used in the way you intend.**

## Sample letter of instruction for your custodian:

[Date]

[IRA Administrator Name]

[IRA Administrator Address]

Re: Request for Qualified Charitable Distribution (QCD) from IRA

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable distribution from my Individual Retirement Account # \_\_\_\_\_, as provided by the Protecting Americans from Tax Hikes Act of 2015.

Please issue a check in the amount of \$\_\_\_\_\_ payable to Catholic Extension Society and mail it to:

Catholic Extension Society  
150 South Wacker Drive  
Suite 2000  
Chicago, IL 60606

Catholic Extension Society's tax identification number is 36-6000520.

In your transmittal to Catholic Extension Society, please include my name and address as the donor of record in connection with this distribution. Please copy me on your transmittal.

It is my intention to have this transfer qualify for the 20\_\_ tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20\_\_.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_ [provide your telephone number or email address].

Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_  
Your Name

Your Address