



Qualified Charitable Distribution Checklist

Follow these easy steps to make your QCD gift today!

Contact your IRA custodian and request a Qualified Charitable Distribution (QCD) form

Complete your distribution form

Most IRA custodians will not identify the donor that the QCD gift comes from, meaning that we won't know who made the gift or if there is a restriction for the gift. To ensure your gift is used in the way you intend, **please instruct your IRA custodian to include your name and address on the memo line or check stub. Checks should be made out as follows*:**

If you are giving to the Annual Catholic Appeal, the check should be made payable to **Annual Catholic Appeal.**

If you are giving to *To Teach Who Christ Is*, the check should be made payable to **To Teach Who Christ Is.**

If you are giving to Priests' Health and Retirement/PRMAA, the check should be made payable to **Priests' Health and Retirement/PRMAA.**

If you would like your gift to support a program or ministry not listed here, please contact **Karen Whitehead** at **312.534.7461** or **kwhitehead@archchicago.org** for more information.

Indicate where to send the QCD check

Instruct your IRA custodian to send your QCD check to:

Archdiocese of Chicago

Karen Whitehead – Stewardship & Development

835 N. Rush St.

Chicago, IL 60611

Mail the form to your custodian

Send your distribution form to your IRA 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.**

Questions?

Please contact **Karen Whitehead** at **312.534.7461** or **kwhitehead@archchicago.org** if you have any questions about making your QCD gift.

This information is not intended as legal, accounting or other professional advice. For assistance in gift planning, please consult an attorney and financial advisor.



Sample Letter to notify your custodian:

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct 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 \$_____ [not to exceed \$100,000] payable to Archdiocese of Chicago (see *Checklist for additional options*) and mail it to:

Archdiocese of Chicago
Karen Whitehead - Stewardship & Development
835 North Rush Street
Chicago, IL 60611

The Archdiocese of Chicago tax identification number is 36-2170826.

In your transmittal to Archdiocese of Chicago, 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

Disclaimer: This information is not intended as legal, accounting or other professional advice. For assistance in legacy planning, consult an attorney for legal advice or the services of a qualified professional.