



# IRA Gift Instructions for Direct QCD Gift to a Qualified Charity

**Live Oaks Community Church**  
**Tax ID Number: 80-0764435**

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

To: IRA CUSTODIAN: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

Please accept this letter as my request to make a Qualified Charitable Distribution (QCD) from my Individual Retirement Account (IRA) # \_\_\_\_\_.

Federal law permits the holder of an IRA or Roth IRA who is 70 ½ or older to make a QCD directly from their IRA to a qualified charity such as LIVE OAKS COMMUNITY CHURCH. Thank you for your assistance with this matter.

Please issue a check in the amount of \$\_\_\_\_\_ payable to LIVE OAKS COMMUNITY CHURCH.

Please transfer the following securities to LIVE OAKS COMMUNITY CHURCH: \_\_\_\_\_

### Instructions for cash transfers:

*Issue check payable to **LIVE OAKS COMMUNITY CHURCH***

LIVE OAKS COMMUNITY CHURCH  
ATTN: Administrator  
11962 CR 101, STE 302  
The Villages, FL 32162

### Instructions for DTC transfers if transferring securities:

Clearing Firm: Fidelity Investments.  
DTC Number: 0226  
Account Name: **Live Oaks Community Church**  
Account Number: **Z73-266426**  
Branch Address: 1057 Lake Sumter Landing, The Villages, FL 32162  
Branch Phone: (352) 205-8836  
My Donor Name: \_\_\_\_\_

Sincerely,

Donor's Name (please print) \_\_\_\_\_ Signature: \_\_\_\_\_

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

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Questions?? Contact Mr. Paul Erdmann, Administrator - Live Oaks Community Church

(352) 901-0550 | [administrator@liveoakschurch.org](mailto:administrator@liveoakschurch.org)



### Notification to LOCC to expect a QCD Gift from IRA

Paul Erdmann, Administrator  
Live Oaks Community Church  
11962 CR 101, STE 302  
The Villages, FL 32162

Dear Mr. Erdmann:

I am pleased to inform you that I have directed the custodian of my Individual Retirement Account ("IRA") to make a Qualified Charitable Distribution (QCD) from my IRA to Live Oaks Community Church. The information concerning my IRA and my gift are described below.

IRA Plan Custodian Name: \_\_\_\_\_

Distribution Amount by check: \$ \_\_\_\_\_

If stock, please watch for the following securities to LOCC transferred by DTC (please specify # shares, company, and approx. value): \_\_\_\_\_

Please use my gift to strengthen the ministries of LIVE OAKS COMMUNITY CHURCH by distributing it in the following way(s):

\$ \_\_\_\_\_ for \_\_\_\_\_  
\$ \_\_\_\_\_ for \_\_\_\_\_  
\$ \_\_\_\_\_ for \_\_\_\_\_

(General Fund, Living Oaks Campaign, Operation Christmas Child, Cast Member Church, Love Inc, Seeds of Hope, Benevolence, Feed My Starving Children, Cuba - Caribbean, Vision Nicaragua, Urban Impact Ministries)

It is my intention that: (1) this gift from my IRA comply with the QCD requirements of Section 408(d) (8) of the Internal Revenue Code; (2) that I will not be able to claim a charitable income tax deduction for my IRA gift.

When you receive the distribution from the custodian of my IRA, please send me a contemporaneous written acknowledgement that includes the following: (1) information about the amount / value of my gift; (2) a statement confirming that no goods or services were transferred to me in consideration for this gift; and (3) that indicates that my gift will not be placed in a donor advised fund, supporting organization or charitable gift annuity.

If you have any questions concerning my gift or this letter, please let me know.

Sincerely,

Donor's Name (please print): \_\_\_\_\_ Signature: \_\_\_\_\_

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

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Date \_\_\_\_\_