



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: Victoria Michaud
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 Ms. Victoria Michaud - Live Oaks Community Church

(352) 446-3975 | victoria@liveoakschurch.org



Notification to LOCC to expect a QCD Gift from IRA

Victoria Michaud
Live Oaks Community Church
11962 CR 101, STE 302
The Villages, FL 32162

Dear Ms Michaud:

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 _____

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 _____