



IRA QUALIFIED CHARITABLE DISTRIBUTION (QCD) FORM IRA QCDs or IRA Charitable Rollovers, as they are sometimes called, are an increasingly popular way for donors 70 ½ or older to support Siena Catholic Schools of Racine (or the school of your choice.) You can make up to \$100,000 in tax-free charitable distributions annually, lowering your taxable income, and, if you're age 72 or older, helping you to meet your minimum distribution requirement or RMD.

To initiate a qualified charitable distribution from your IRA to Siena Catholic Schools of Racine, or any of our six schools (specifically), your IRA trustee will need the following information:

- Legal Name: Siena Catholic Schools of Racine Inc.
- Taxpayer ID: 82-2591859
- Permanent Address: 1200 Park Avenue, Racine, WI 53403

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when Siena Catholic Schools 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.

In your transmittal to the Siena Catholic Schools, **please indicate my name and address as the donor of record and copy me on your correspondence in connection with this transfer.** It is my intention to have this transfer qualify for exclusion during this tax year.

Donor's signature: _____ Date: _____
Printed Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Email: _____
IRA gift amount: \$ _____ School you want to support _____
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:

**Siena Catholic Schools of Racine: ATTN Chris Sosnay
1200 Park Ave
Racine, WI 53403**

