




# St. Tammany Project Christmas

MORE THAN JUST GIFTS - *GIVING CHILDREN MEMORIES FOR A LIFETIME*

P.O. Box 4043, Slidell, LA 70459 • 985-259-5770 • [www.stprojectchristmas.org](http://www.stprojectchristmas.org) • 

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## Support St. Tammany Project Christmas with a Gift from Your Retirement Fund

If you are aged 70½ or older, you again have the opportunity to save on taxes and make a charitable rollover gift from your IRA. With a direct transfer from your traditional IRA to St. Tammany Project Christmas, you satisfy your minimum required distribution for the year. IRA Charitable Rollover transfers are income tax-free.

### IRA Charitable Rollover - Fast Facts

- You must be 70 ½ and older
- Transfers must be made directly from the IRA to St. Tammany Project Christmas
- Your taxable income can be reduced by up to \$100,000, the maximum allowable
- Only traditional IRA accounts are eligible. The IRA Charitable Rollover cannot be used with other retirement plans such as a 401(k), 403(b) or a SEP IRA

*Contact your financial advisor to see if the IRA Charitable Rollover is a good option for you. You will need to provide the sample letter attached to your IRA administrator.*

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## ***SAMPLE Request Letter from IRA Plan Owner to IRA Administrator/Custodian for a Qualified Charitable Distribution from an Individual Retirement Account***

Date

IRA Administrator/Custodian Name

Street Address

City, State, Zip

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear IRA Administrator/Custodian:

Please accept this letter as my request to make a direct charitable distribution from my IRA account \_\_\_\_\_ (specify account number) as provided by Sec. 112 of the Protecting Americans From Tax Hikes (PATH) Act of 2015 and Sec. 408 (d) (8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$\_\_\_\_\_ payable to the organization below.

St. Tammany Project Christmas

P.O. Box 4043

Slidell, La. 70459

EIN: 71-0899895

In your transmittal to St. Tammany Project Christmas, whose Federal Tax ID Number is 71-0899895, please include my name as the IRA owner of record in connection with this transfer. Please copy me on the transmittal letter.

Thank you for your assistance. Please contact me at \_\_\_\_\_ (your phone number) or \_\_\_\_\_ (your email) if you have any questions at all.

Sincerely,

Your First and Last Name

Street Address

City, State, Zip

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