



**“HAPPY THE ONE WHO,
TRUSTS IN THE LORD!”**
PROVERBS 16:20

Fulfilling Your DSA Pledge with a Qualified Charitable Distribution from Your IRA

Thank you for your support of the Diocesan Services Appeal! With an IRA charitable rollover gift you can support the work of the Catholic Church in the Diocese of Lansing and enjoy valuable tax benefits by making a qualified charitable distribution (QCD) to The Catholic Foundation. Even better, your gift may count toward your required minimum distribution for the year. If you make a QCD, you will not have to pay federal income tax on the amount of your rollover gift.

Requirements/Limitations

- Donors must be age 70 ½ or older on the date of the gift
- Up to \$100,000 may be given annually.
- Only funds in traditional and Roth IRAs are eligible. QCDs are not allowed from inherited IRAs, 401(k)s, 403(b)s, or other qualified retirement plans. However, some people may be able to roll assets from such a plan into a traditional IRA and then make QCD.

READY TO MAKE A DSA GIFT FROM YOUR IRA? IT'S EASY, JUST FOLLOW THESE STEPS!

1. **Contact** your IRA administrator to request a distribution check payable to: The Catholic Foundation
2. **Notify** The Catholic Foundation of your name, address, phone number, email, parish name, and DSA gift designation to ensure the proper use of your gift. You may also share that information with your IRA administrator.
3. **Send** your check to: The Catholic Foundation, 101 S. Washington Square, Suite 620, Lansing, MI 48933

The Catholic Foundation Federal Tax ID: 81-2025056

The Catholic Foundation Contact:

Matt Hufnagel, Vice President of Development

517.253.8748 or mhufnagel@dioceseoflansing.org

This information is not intended as tax, legal, or financial advice. Consult your personal financial or tax advisor for information specific to your situation.