



IRA charitable rollover gift form

The IRA Charitable Rollover provision of the Internal Revenue Service Code Section 408(d)(8) allows individuals who have reached age 70½ to make qualified charitable distribution, or QCD, gifts of up to \$105,000 per calendar year directly from IRAs to qualified charitable organizations. QCDs can satisfy all or part of the IRA owner’s required minimum distribution and avoid treatment of the distribution as taxable income.

To initiate a qualified charitable distribution from your IRA to Monroe Street Arts Center, your IRA trustee will need the following information:

Legal name: Monroe Street Arts Center, Inc

Taxpayer ID: 39-1854207

Permanent address: 1732 West Lawn Avenue, Madison, WI 53711

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when Monroe Street Arts Center 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.

Donor’s signature: _____ Date: _____

Printed name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Email: _____ Phone: _____

IRA gift amount: \$ _____ Name of IRA financial institution: _____

Please return this form to your IRA trustee and instruct them to send the form and your IRA charitable rollover gift to:

Monroe Street Arts Center
1732 West Lawn Avenue
Madison, WI 53711

