



United Way  
of Westchester and Putnam

## 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 the lifesaving work of the United Way of Westchester and Putnam. 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 the United Way of Westchester and Putnam, your IRA trustee will need the following information:

**Legal name:** United Way of Westchester and Putnam

**Taxpayer ID:** 13-1997636

**Permanent address:** 336 Central Park Avenue  
White Plains, NY 10606

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when the United Way of Westchester and Putnam 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 United Way of Westchester and Putnam, 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: \$ \_\_\_\_\_

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:**

United Way of Westchester and Putnam  
336 Central Park Avenue  
White Plains, NY 10606