

ERIE GIVES & QUALIFIED CHARITABLE DISTRIBUTIONS



Chances are, many of your clients have reached the age where they must take their required minimum distributions from their IRAs. For those who may not need or use the income, we have the perfect opportunity for them: Qualified Charitable Distributions ("QCDs"), or a "Charitable Rollover." Up to \$100,000 is eligible for this income tax-free way to benefit your clients favored local nonprofits!

Why not maximize the charitable impact by using a QCD on Erie Gives? Every donation made on Erie Gives (Tuesday, August 13, 2024) is eligible for a prorated match, which we call Bonus Bucks!

When you use a QCD on Erie Gives, everybody wins:

- Nonprofits receive more money on the dollar, which strengthens our community.
- Your clients fulfill their minimum distribution requirements and support the causes they love.
- Most importantly, you're a hero/heroine because you made your clients' giving so easy!

THE PROCESS IS SIMPLE

NO DONOR ADVISED FUNDS ARE INVOLVED

1. Confirm the rollover amount to your client and issue a check to The Erie Community Foundation at 459 West Sixth Street, Erie, PA 16507.
2. Make sure your client completes giving instructions on the Erie Gives Check Contribution Form. This confirms the total amount of their gift as well as the nonprofit your client is supporting. Then, email or mail the form to The Erie Community Foundation's Philanthropic Services team.
3. Checks and instructions must be received by the Foundation no later than Tuesday, August 13, 2024.
4. Each client will receive an acknowledgment letter suitable for tax purposes and fully compliant with all federal QCD instructions.

MEET THE ERIE COMMUNITY FOUNDATION'S PHILANTHROPIC SERVICES TEAM



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