

# Making a gift to the Cystic Fibrosis Foundation through Charitable IRA Rollover

Receive a tax break while adding tomorrows.



**By making a charitable gift to the Cystic Fibrosis Foundation through your Charitable IRA Rollover, you can:**

- Avoid paying tax on your gift and all, or part, of your minimum distribution requirement
- Enjoy a quick and easy estate tax reduction
- Join the CF Foundation in your shared vision to find a permanent, one-time cure for CF

## Who qualifies for this gift?

Beginning January of 2020, if you are 72 or older, a qualifying rollover gift can count toward satisfying your Required Minimum Distribution\* (RMD).

If you are 70 ½ or older, you may give up to \$100,000 using funds from your traditional or Roth IRA to support the mission of the Cystic Fibrosis Foundation. Not only do you help add tomorrows to the lives of those affected by CF, but you also can avoid paying tax on your gift and beginning at age 72, all or part, of your RMD.

\*Congress has waived the annual Required Minimum Distribution from IRA Accounts in the year 2020 as part of the CARES Act in response to COVID-19. Please consider seeking advice from your financial advisor or tax professional to understand how recent changes to laws governing retirement may impact you and your charitable gift.

## How do I make a Charitable IRA Rollover?

To make your gift, contact your IRA administrator and, if needed, provide them with our Tax ID Number: 13-1930701. A copy of a letter of authorization to send to your IRA administrator is available below.

To learn more about how to make a Charitable IRA Rollover to the Cystic Fibrosis Foundation, contact Amanda Zar, Planned Giving Director, at (301) 907-2582 or [azar@cff.org](mailto:azar@cff.org).

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## JOIN THE LEGACY SOCIETY

Many families and friends name the Cystic Fibrosis Foundation in their will, trust or as a beneficiary of their IRA or life insurance policy. If you have already done so, please let us know so we can list you as a member of our Legacy Society of supporters. Learn more: [www.cff.org/LegacyGiving](http://www.cff.org/LegacyGiving)

Please contact me about my charitable giving plans at:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

# Sample letter directing a Charitable IRA Rollover to the Cystic Fibrosis Foundation



## Request from IRA Owner to Administrator for Charitable Distribution from IRA to the Cystic Fibrosis Foundation

[Date]

[IRA Administrator Name]

[IRA Administrator Address]

### Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account #\_\_\_\_\_.

Please issue a check in the amount of \$\_\_\_\_\_ [not to exceed \$100,000] payable to the Cystic Fibrosis Foundation at the address below:

Cystic Fibrosis Foundation  
4550 Montgomery Avenue  
Suite 1100 N  
Bethesda, MD 20814

In your transmittal to the Cystic Fibrosis Foundation, please give my name and address as the donor of record in connection with this transfer. Please credit the following chapter for my gift \_\_\_\_\_ and only if applicable please credit the following special event \_\_\_\_\_ at the CF Foundation. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion for the 20\_\_ tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20\_\_.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_ [provide telephone number or email address]. Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_  
[Your Name, the Plan Owner Name]

[Your Address, the Plan Owner Address]