

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 required minimum distribution
- Enjoy a quick and easy estate tax reduction
- Support a broad range of research and care initiatives to tackle the disease from all angles
- Join the CF Foundation in your shared vision to find a permanent, one-time cure for CF

Who qualifies for this gift?

With recent changes to legislation under the SECURE Act 2.0 beginning January of 2023, the age in which IRA holders must take their required minimum distribution (RMD) has been increased to 73. However, anyone age 70 ½ or older can still make Qualified Charitable Distributions (QCD) to support the mission of the Cystic Fibrosis Foundation.

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, Senior Director of Planned Giving at (301) 907-2582 or 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

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 \$_____ payable to the Cystic Fibrosis Foundation Tax ID Number: **13-1930701** 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]