

# ERIE GIVES & QUALIFIED CHARITABLE DISTRIBUTIONS



Chances are, many of your clients have reached the age where they are required to take annual distributions from their IRAs. Many of these, in turn, may not need or use the income. This is a perfect opportunity to introduce a Qualified Charitable Distribution ("QCD"), or "Charitable Rollover." As you know, up to \$100,000 is eligible for this income tax-free way to benefit local nonprofits.

Why not maximize the charitable impact by using a QCD on Erie Gives? Every donation made on Erie Gives (Tuesday, August 8, 2023) is eligible for a pro-rated match, which we call Bonus Bucks!

When you use a QCD on Erie Gives 2023, everybody wins: The nonprofits receive more money on the dollar, which makes our community stronger. Your clients fulfill their minimum distribution requirements and support the causes they love. Most importantly, you're a hero/heroine because you made their giving all so easy!

## THE PROCESS IS SIMPLE

### NO DONOR ADVISED FUNDS ARE INVOLVED

1. Confirm the rollover amount to your client, and issue the check to The Erie Community Foundation, 459 West Sixth Street, Erie PA 16507.
2. Make sure the client completes giving instructions on the Erie Gives Check Contribution Form which confirms the total amount and the nonprofits he/she wants to support. 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 1, 2023.
4. Every client will receive an acknowledgment letter suitable for tax purposes and fully compliant with all federal QCD instructions.

**IT'S THAT SIMPLE! Unnecessary income tax is avoided, RMDs are met, and deserving local nonprofits receive a match on every dollar – TRULY A WIN-WIN!**

## MEET THE ERIE COMMUNITY FOUNDATION'S PHILANTHROPIC SERVICES TEAM



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[www.ErieCommunityFoundation.org](http://www.ErieCommunityFoundation.org) | [www.ErieGives.org](http://www.ErieGives.org)



459 West 6th Street, Erie, PA 16507



# ERIE GIVES CHECK CONTRIBUTION FORM

Please make checks payable to The Erie Community Foundation (459 West 6th Street, Erie, PA 16507) and deliver with this completed form no later than August 8, 2023.



By writing a check to The Erie Community Foundation 100% of your donation will be given to your designated nonprofit(s).

## ALL INFORMATION IS REQUIRED.

Donor First Name(s): \_\_\_\_\_

Donor Last Name(s): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

*Your email is collected for receipt purposes only.*

Check Number: \_\_\_\_\_ Contribution Total: \_\_\_\_\_

Please list how you wish to be identified in print: \_\_\_\_\_

*Example: Jayne & John Doe | John Doe | Anonymous*

Does your employer match donations?  Yes  No Company Name: \_\_\_\_\_

*Please note, the employee is responsible for completing the employer's company match paperwork.*

Erie Gives Nonprofit Name (s) <i>All nonprofits listed below must be listed on the Erie Gives website</i>	Gift Amount <i>\$25 minimum</i>

### FOR OFFICE USE ONLY

Received:  Mail  In-Person  Information Verified  Entered