INSTRUCTIONS TO MAKE IRA QUALIFIED CHARITABLE DISTRIBUTION (“QCD”) OR CHARITABLE ROLLOVER GIFTS TO SVCF

Contact your Traditional or Roth IRA retirement plan administrator well before the December 31 deadline and ask how to initiate the transfer. All qualified distributions must be made directly to Silicon Valley Community Foundation (SVCF) by the plan administrator. Your plan administrator may have a form for you to complete.

If plan administrator does not have a form, submit your written request with the following information:

1. Your name and plan ID/account number.
2. Instruct plan administrator to make a “qualified charitable distribution” or “charitable IRA rollover” directly to Silicon Valley Community Foundation.
3. Include the desired distribution amount ($1-$100,000).
4. Instruct plan administrator to include your name on the check.

NOTE: Unfortunately, IRS Rules do not permit IRA Rollover Contributions to Donor Advised Funds (DAFs) or Supporting Organizations. Gift purpose can be designated to SVCF Funds — add to Memo section as well.

- SVCF Strategic Initiatives
  - Housing: Increasing Access to Housing Opportunities Fund 4538
  - California Black Freedom Fund 6044
  - LatinXCEL Fund 6085
- The Community Endowment Fund 3243
- The Bright Futures Scholarship Endowment Fund 4669

5. Instruct plan administrator to make the qualified charitable distribution directly to Silicon Valley Community Foundation by check following these instructions:

CHECKS PAYABLE TO SILICON VALLEY COMMUNITY FOUNDATION

Mail Check with your name & gift purpose referenced in memo section to:
Silicon Valley Community Foundation
Attention: Gifts Administration
2440 West El Camino Real, Suite 300
Mountain View, CA 94040-1498
Federal Tax ID #: 20-5205488

1. In all cases, distribution should be made directly to SVCF with your name included on the check. The check should not come to you.
2. Once your IRA distribution is received, you will receive a special acknowledgement from SVCF for use when you complete your taxes.

Thank you for supporting SVCF.