SVCF

**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 <u>not</u> 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:

<u>CHECKS PAYABLE TO SILICON VALLEY COMMUNITY FOUNDATION</u>
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.

**SILICON
VALLEY
COMMUNITY
FOUNDATION**