

UWM Foundation Instructions: Gifts Using Qualified Charitable Distribution (QCD)

If you are 70 ½ or older, you may transfer up to \$100,000 in a single year from your IRA directly to a qualified charity such as the UWM Foundation without recognizing the transferred assets as taxable income. Once you turn 72, you can use the Qualified Charitable Distribution (QCD) to meet all or part of your annual required minimum distribution (RMD). Some IRA administrators refer to this as the "IRA Charitable Rollover."

Keep in mind that this opportunity applies only to IRAs, and not to other types of retirement plans. Complete this form and provide it to your IRA Administrator today!

STEP 1: DONOR NAME _____

Address _____ City, State, Zip _____

Phone number and email _____

Purpose supported by gift: ___ Unrestricted or Fund Name: For the benefit of WUWM Milwaukee Public Radio

STEP 2: IRA ADMINISTRATOR NAME _____

IRA Account No. _____

IRA Contact Name and Phone _____

STEP 3: (A) Distribution to Charity by Direct Mail

UWM Foundation, Inc. (Checks payable to "UWM Foundation, Inc.")
1440 E. North Ave.
Milwaukee, WI 53202
UWM Foundation Tax ID: 23-7337744

Contact Melissa Paulik, UWM Foundation
Phone: 414.906.4677 and Fax: 414.906.4680
Email: mpaulik@uwm.foundation

(B) Distribution to Charity by Electronic Delivery Via Depository Trust Company (DTC)

Please return this completed form to Melissa Paulik, UWM Foundation, before any electronic transfer of funds so that the donor receives proper acknowledgement.

Depository Trust Company (DTC) Information:

BMO Harris Bank N.A.

DTC ID: 992

UWM Foundation Custody Account: 98-61-K021-02-2

Contact Joseph Brzycki, BMO Harris Bank N.A., Milwaukee, WI
Phone: 414.287.7317
Email: joseph.brzycki@bmo.com

A few things to keep in mind:

- You can use the QCD to fulfill existing pledges, but not to fund a charitable gift annuity.
- References to income taxes include federal taxes only. State income tax law may impact your results.
- Please consult your own attorney or tax advisor for legal or tax advice.