
Company

Date

Address

**Request for a qualified charitable distribution from my
Individual Retirement Account for the 2024 Tax Year**

Dear IRA Custodian:

Please accept this letter as my request to make a Qualified Charitable Distribution (QCD) from my IRA account # _____.

Please issue a check in the amount of \$ _____ payable to **Pleasant View Communities** (a charitable organization with EIN 23-1869182) at the following address:

Pleasant View Communities
Development Office
544 N. Penryn Road
Manheim, PA 17545

In your transmittal to the above-named organization, please communicate my name and address as the donor of record. Also, please indicate that the purpose of the gift is:

[Donor Designation (Benevolent Care, *The Heart of Community*, etc.) or "Unrestricted"]

Please copy me on your transmittal:

It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the 2024 tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2024.

If you have any questions or need to contact me, I can be reached at _____.
Thank you for your assistance and prompt attention to this matter.

Sincerely,

Signature

Street Address

Print Name

City, State, Zip

A way to give & save on taxes

“I wish I had known about IRA QCD gifts sooner.”

In 2023, a Residential Living resident made an IRA QCD (Qualified Charitable Distribution) gift to Pleasant View Communities.

The resident explains that he wishes he had known about an IRA QCD gift sooner and hopes others will consider it to save on taxes while blessing your neighbors at Pleasant View.

Once you are age 73, you are required to make an annual RMD (required minimum distribution) from your IRA. Normally, distributions from a traditional IRA are taxable when received (and might increase your tax bracket).

With a QCD, however, these distributions become tax-free as long as they're paid directly from the IRA to an eligible charitable organization (like Pleasant View or your church). You can donate all or a portion of your RMD (to one or more eligible charitable organizations).

An individual donor can contribute up to \$105,000 per year in QCDs, as long as that individual is 70½ years old or older. For married couples, each spouse can make QCDs up to the \$105,000 limit for a potential total of \$210,000.

Mindy Fetherman, Development Associate, can provide a simple one-page form for you to complete and share with your IRA administrator.

Once Pleasant View receives your gift, you will get an IRA-QCD-specific gift acknowledgement that you'll need for your taxes. IRA QCD gifts are claimed on the front page of Form 1040 (not as an itemized deduction on schedule A). Your tax-preparer or financial advisor can answer questions you may have.

Email mfetherman@pvcommunities.org or call 717-664-6266 for more information.

