



**LOUISIANA
BAPTIST
FOUNDATION**

Instructions for IRA Charitable Rollovers

The Louisiana Baptist Foundation receives gifts on behalf of Louisiana Baptist churches, institutions, and organizations as well as accounts managed on behalf of donors.

To ensure your qualified charitable distribution is properly transferred to the LBF account, please follow the instructions below.

Please provide the following information to the Louisiana Baptist Foundation:

Donor Name: _____

Donor Address: _____

City _____ State _____ ZIP _____

Donor Phone: (____) ____ - ____ Donor e-mail: _____

IRA Custodian: _____

Custodian's Phone: (____) ____ - ____ Custodian's e-mail: _____

Distribution Amount: \$ _____ Approximate date of delivery: ____/____/____

Please provide the name of the Louisiana Baptist Foundation IRA Charitable Rollover Account -OR- the church, institution, or organization that will receive the distribution:

LBF Account Name: _____

-OR-

Church/Ministry Name: _____

Address _____ City _____ State _____ ZIP _____

Please provide any additional comments or instructions:

A qualified charitable distribution from an IRA is not a tax-deductible charitable contribution like a gift of cash, securities, or other similar assets. However, it may count towards your annual IRA required minimum distribution and not deemed taxable income for you. You may receive a Form 1099 from your IRA custodian reflecting the qualified charitable distribution. Please consult your tax advisor to ensure this gift is properly reflected in your tax return.

Please provide the following delivery instructions to your custodian for the distribution:

To send by mail: Louisiana Baptist Foundation, P.O. Box 311, Alexandria, LA 71309

To send electronically:

Louisiana Baptist Foundation
(877) 523-4636
contact@LBFinfo.org

Tax ID 72-0478545
DTC Clearing #: 0015
Acct#: 773-120613-263

Morgan Stanley Smith Barney
3800 Glenwood Avenue, Ste. 500
Raleigh, NC 27612

Please provide the completed form to your custodian and send to the LBF:

Via Fax: (318) 445-8575

Via e-mail: contact@LBFinfo.org

Via USPS: Louisiana Baptist Foundation, P.O. Box 311, Alexandria, LA 71309