Instructions for IRA Charitable Rollovers

LOUISIANA BAPTIST FOUNDATION

P.O. Box 311
Alexandria, LA 71309-0311
(318) 445 - 4495
contact@LBFinfo.org

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 Email: ______________________________

IRA Custodian: ______________________________

Custodian Phone: (____) _____ - ________ Custodian Email: ______________________________

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: ________

☐ I want this to be distributed anonymously to the recipient.

Please provide any additional comments or instructions:

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

To send electronically:

Louisiana Baptist Foundation
(318) 445 - 4495
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

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

Please provide the completed form to your custodian and send to the Louisiana Baptist Foundation:

Fax: (318) 445 - 8575
Email: contact@LBFinfo.org
Mail: Louisiana Baptist Foundation, P.O. Box 311, Alexandria, LA 71309

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 toward 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.