



31 Oak Avenue • Suite 100
Chalfont, PA • 18914
215.822.2812

IRA Charitable Rollover Gift Form

This form is to be used to facilitate a charitable gift to Habitat for Humanity of Bucks County from an IRA account as an IRA Charitable Rollover. The IRA Charitable Rollover provision allows individuals who have reached age 70½ to donate up to \$100,000 to charitable organizations directly from their Individual Retirement Account (IRA), without treating the distribution as taxable income. If you have questions regarding your eligibility for this opportunity, please consult your legal or tax advisor.

Please provide the following information to your IRA custodian to complete the gift process.

I/we, _____,
would like to direct an IRA distribution directly to Habitat for Humanity of Bucks County from my/our Individual Retirement Account as described below.

IRA Plan Trustee/Administrator Name: _____

Account Number: _____

Distribution Amount: _____

Comments: _____

It is my intention that this IRA rollover gift complies with the “qualified charitable distribution” requirements of Section 408(d)(8) of the Internal Revenue Code. Accordingly, when payment is received from my trustee/administrator, please send me a written acknowledgment that includes the amount of my gift, states that no good or services were transferred to me in consideration for this gift, and indicates that my gift will not be placed in a donor advised fund or supporting organization. Please contact me if you have any questions.

Donor’s Signature: _____ Date: _____

Donor’s Signature: _____ Date: _____

Printed Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

The IRA distribution can be mailed to:

Habitat for Humanity of Bucks County
Attn: Candace Clarke, Resource Development Director
31 Oak Avenue, Suite 100
Chalfont, PA 18914

Or, it can be sent electronically from the IRA custodian to Habitat for Humanity of Bucks County via ACH as follows:

Bank Name: QNB
Address: P.O. Box 9005, Quakertown, PA 18951
Routing #: 031907790
Account#: 2068203

Habitat for Humanity of Bucks County is a registered 501(c)(3) nonprofit organization. As such, any donations made to Habitat for Humanity of Bucks County are tax deductible to the extent provided by law. The tax identification number of Habitat for Humanity of Bucks County is 23-2607106.

Our Dream Builders Society recognizes our forward-thinking friends who have made planned charitable gifts that benefit others both during and after their lifetime.

Please select the option you prefer:

- Yes, I/we authorize Habitat for Humanity of Bucks County to include my/our name(s) on the Dream Builders membership list in publications and on public recognition displays. I/we understand that this authorization is limited to the use of my/our name(s) only, and that the type and amount of my/our gift will remain confidential.
- I/we prefer to remain an anonymous member of the Dream Builders Society.

To ensure proper gift acknowledgment, a copy of this completed form should be sent to:

Habitat for Humanity of Bucks County
Attn: Candace Clarke, Resource Development Director
31 Oak Avenue, Suite 100
Chalfont, PA 18914

Questions? Contact Candace Clarke at 215.822.2812, x 316 or c.clarke@habitatbucks.org.

Thank you!

Building Communities, Empowering Families

HabitatBucks.org