

Ways to Give with your IRA: Qualified Distributions/Required Minimum Distributions

If you are age 70.5 or older, you may make a Qualified Charitable Distribution (QCD) from your IRA of up to \$105,000 each year.

If you are age 73 or older, you are required to make a Required Minimum Distribution (RMD) from your IRA each year, and this amount will be calculated based upon the value of your IRA.

You may use your QCD and/or RMD to make a charitable distribution of these funds from your IRA to the University while avoiding a taxable event for you.

When you are ready to make a Qualified Charitable Distribution (QCD) or a Required Minimum Distribution (RMD) from your IRA, here is the information you may need to provide to the financial organization that manages your IRA. Remember the distribution should come directly from the organization that manages your IRA to the University to avoid incurring taxes to be paid on the distribution.

Legal Name: The University of the South

Tax ID Number: 62-0475697

Address:

Allison A. Cardwell
Director of Gift and Estate Planning
735 University Avenue
Sewanee, TN 37383-1000
aacardwell@sewanee.edu
(931) 598-1751

Please let us know that your distribution is on the way, and let us know if you want the distribution used for a specific purpose. We appreciate your support for the University.