



Charitable IRA Rollover Gifts: Qualified Charitable Distribution (QCD)

Instructions & Information

1. Please contact your IRA custodian to request forms and instructions to rollover your IRA distribution as a charitable gift to **The Medical University of South Carolina Foundation** ("**MUSCF**"), Federal Tax ID: **57-6028985**.

Please request the charitable IRA rollover or QCD distribution check be made payable to **The Medical University of South Carolina Foundation** ("**MUSCF**"), Federal Tax ID: **57-6028985**.

Please request that your **name** appear on the **Memo Line** of the check or on the accompanying check stub. If space permits, please also include the **fund designation**.

Please instruct your IRA Custodian to mail the check to the following:

MUSC Foundation
ATTN: IRA Gift Processing
18 Bee Street, MSC 450
Charleston, SC 29425

2. Please notify the MUSC Foundation Office of Gift & Estate Planning of your IRA gift by contacting us at (843) 792-9562 or at howeleli@musc.edu and include the following information:

Name of your IRA custodian

IRA gift amount

How the gift is to be designated (*as detailed as possible, i.e. name of fund*)

Your contact information (*address, phone, email, etc.*)

3. **MUSC Office of Gift and Estate Planning Contact:**

Elizabeth Howell
Associate Director, Gift & Estate Planning
18 Bee Street, MSC 450
Charleston, SC 29425
Email: howeleli@musc.edu

DISCLAIMER

No Legal Advice Intended: The contents of this form are intended to convey general information only and should not be construed as or relied upon for legal or tax advice in any particular circumstance or fact situation. You should contact your attorney or other financial adviser for advice on specific legal issues.