



RETIREMENT CONTRIBUTIONS (IRA QCDS)

If you're 70½ or older, you may make a Qualified Charitable Distribution (QCD) directly from your IRA to Legacy Imperative.

This can satisfy part or all of your required minimum distribution while reducing your taxable income.

Checks payable to:

The Legacy Imperative, Inc.
4850 Tamiami Trail N., Suite 301
Naples, FL 34103

Tax ID / EIN: 84-3011577

What Is a QCD?

A QCD is a direct transfer from your IRA to a qualified charity, excluded from taxable income (up to \$100,000 per year, subject to IRS limits).

Important: QCDs must be made directly from your IRA custodian to Legacy Imperative. If you withdraw the funds first, the IRS counts it as taxable income.

How to Make a QCD

Instruct your IRA custodian to send the distribution directly to Legacy Imperative using the address above. Each financial institution may have its own process.