



Diocese of Tulsa

and Eastern Oklahoma

Fulfilling Your Faith & Works Pledge with a Qualified Charitable Distribution from Your IRA

Thank you for your support of the Faith & Works Appeal! With an IRA charitable rollover gift, you can support the work of the Catholic Church in the Diocese of Tulsa and enjoy valuable tax benefits by making a qualified charitable distribution (QCD) to the Diocese. Even better, your gift may count toward your required minimum distribution for the year. If you make a QCD, you will not have to pay federal income tax on the amount of your rollover gift.

Requirements/Limitations

- Donors must be age 70 ½ or older on the date of the gift
- Up to \$111,000 may be given individually or \$222,000 for married couples filing jointly on an annual basis.
- Only funds in traditional, inherited, and Roth IRAs are eligible. QCDs are not allowed from 401(k)s, 403(b)s, or other qualified retirement plans. However, some people may be able to roll assets from such a plan into a traditional IRA and then make QCD.

READY TO MAKE A GIFT to F&W FROM YOUR IRA? IT'S EASY, JUST FOLLOW THESE STEPS!

1. **Contact** your IRA administrator to request a distribution check payable to: The Catholic Diocese of Tulsa and Eastern Oklahoma
2. **Notify** The Diocese of Tulsa of your name, address, phone number, email, parish name, and Faith & Works gift designation to ensure the proper use of your gift. You may also share that information with your IRA administrator.
3. **Send** your check to: The Diocese of Tulsa, 12300 E. 91st Street S., Broken Arrow, OK 74012

Diocese of Tulsa Federal Tax ID: 73-0942657

The Diocese of Tulsa Contact:

Philip Creider:

918-307-4927 or philip.creider@dioceseoftulsa.org

This information is not intended as tax, legal, or financial advice. Consult your personal financial or tax advisor for information specific to your situation.