



## IRA Charitable Rollover

The now-permanent IRA Charitable Rollover provision allows alumni and friends of La Salle Academy to reduce their taxable income, achieve charitable giving goals and satisfy their required minimum distribution – all in one transaction. If you are over age 70 ½, you can donate up to \$100,000 from your IRA directly to La Salle without triggering any federal income taxes.

Below is language you can use to notify your IRA administrator of your intention to make a charitable distribution from your IRA to La Salle Academy via check or wire transfer.

*Please note: Your IRA administrator may require additional forms or documentation. Please contact your administrator or financial advisor to ensure that all documentation is complete.*

*The Legacy Society*  
at La Salle Academy



La Salle Academy Development Office  
Ismini Scouras  
Vice President for Institutional Advancement  
(212) 475-8940 ext. 204  
[iscouras@lasalleacademy.org](mailto:iscouras@lasalleacademy.org)  
44 East 2<sup>nd</sup> Street  
New York, NY 10003

## Instructions for IRA Distribution by Check

Please forward a copy of the letter below to Ismini Scouras at La Salle Academy. The postmark on the envelope from your IRA Administrator will act as the date of your gift.

*Date*

*Address of IRA Administrator*

*Dear Sir or Madam:*

*Please accept this letter as authorization to make a charitable distribution from my Individual Retirement Account # \_\_\_\_\_ . Please issue a check made payable to La Salle Academy (Tax ID # 13-5562201) in the amount of \$ \_\_\_\_\_ , and send it to:*

*Ms. Ismini Scouras  
La Salle Academy Development Office  
44 East 2<sup>nd</sup> Street  
New York, NY 10003*

*These funds are to be used for the purpose of \_\_\_\_\_ .*

*Please include my name and address as the donor of record for this transfer within your correspondence to La Salle. Additionally, please send a copy to me for my own documentation.*

*If you have any questions or need additional information, please contact me at the number below. Thank you for your prompt assistance with this transfer.*

*Sincerely,*

*[Signature of IRA Owner]*

*cc: Ismini Scouras, Vice President for Institutional Advancement, La Salle Academy*

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at La Salle Academy



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44 East 2<sup>nd</sup> Street  
New York, NY 10003

## Instructions for IRA Distribution by Wire Transfer

Please forward a copy of the letter below to Ismini Scouras at La Salle Academy. The postmark on the envelope from your IRA Administrator will act as the date of your gift.

*Date*

*Address of IRA Administrator*

*Dear Sir or Madam:*

*Please accept this letter as authorization to make a charitable distribution from my Individual Retirement Account # \_\_\_\_\_.*

*Please execute a wire transfer in the amount of \$ \_\_\_\_\_ to La Salle Academy (Tax ID # 13-5562201) with the following information:*

*Contact Ismini Scouras for transfer information.*

*These funds are to be used for the purpose of \_\_\_\_\_.*

*Please include my name and address as the donor of record for this transfer within your correspondence to La Salle. Additionally, please send a copy to me for my own documentation.*

*If you have any questions or need additional information, please contact me at the number below. Thank you for your prompt assistance with this transfer.*

*Sincerely,*

*[Signature of IRA Owner]*

*cc: Ismini Scouras, Vice President for Institutional Advancement, La Salle Academy*