

The Legacy Society
at La Salle Academy



La Salle Academy Development Office
Justin Talavera
Director of Major Gifts and Grant Funding
(212) 475-8940 ext. 204
jtalavera@lasalleacademy.org
215 East 6th Street
New York, NY 10003-8253

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.

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Instructions for IRA Distribution by Check

Please forward a copy of the letter below to Justin Talavera 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 # 13-5562179) in the amount of \$ _____ , and send it to:

*Mr. Justin Talavera
La Salle Academy Development Office
215 East 6th Street
New York, NY 10003-8253*

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: Justin Talavera, Director of Major Gifts and Grant Funding, La Salle Academy

Disclaimer: The information presented in this literature is not intended as legal or tax advice.

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Instructions for IRA Distribution by Wire Transfer

Please forward a copy of the letter below to Justin Talavera 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 # 13-5562179) with the following information:

Contact Justin Talavera 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: Justin Talavera, Director of Major Gifts and Grant Funding, La Salle Academy