

RETIREMENT FUND GIFTS

GEORGE WASHINGTON'S MOUNT ★ VERNON

THE MOUNT VERNON LADIES' ASSOCIATION



Giving to the Mount Vernon Ladies' Association from Retirement Funds

As you think about the charitable gifts you would like to make during your lifetime or through your estate, giving from your retirement funds is a fantastic way to generously give to the Mount Vernon Ladies' Association, create your legacy, and maximize income and tax savings.

There are two ways to give from your retirement funds:

- **Beneficiary Designation** of your retirement plan to the Mount Vernon Ladies' Association may be a prudent tax planning option for you and your family. Because proceeds from retirement plans may be subject to both estate and income taxes, giving directly to charities like the Mount Vernon Ladies' Association is a tax-efficient way to create your legacy.
- **IRA Qualified Charitable Distribution:** If you are 70½ or older, you may be able to take advantage of your IRA to make tax-smart charitable gifts to the Mount Vernon Ladies' Association. By requesting a qualified charitable distribution (QCD) from your IRA, you can direct up to \$111,000* each calendar year to the Mount Vernon Ladies' Association (*Based on 2026 limits). This can count toward your annual Required Minimum Distribution (RMD) if you are over the age of 72.

The Mount Vernon Ladies' Association of the Union, Tax ID #54-0564701, a charitable corporation located in Virginia with the mailing address of P.O. Box 110, Mount Vernon, VA 22121. This information is not intended as legal, financial, or tax advice. Please consult an attorney, financial advisor, or tax advisor in your planning.

How to Make an IRA Qualified Charitable Distribution:

1. Contact your IRA administrator for instructions on how to request a qualified charitable distribution for the Mount Vernon Ladies' Association.

Legal Name: The Mount Vernon Ladies' Association

Address: P.O. Box 110, Mount Vernon, VA 22121

EIN #54-0564701

Contact: Email support@mountvernon.org or call 703.799.8647.

2. Notify the Mount Vernon Ladies' Association about your incoming QCD and any designation for your gift at support@mountvernon.org or 703.799.8647.
3. **Note:** If you have the ability to make self-directed payments from an IRA checkbook, checks must be deposited by the MVLA before December 31 to qualify toward your Required Minimum Distribution. Be sure to mail checks early and confirm receipt with the Mount Vernon Ladies' Association. If you're unsure your funds will arrive before the end of the year, have your IRA account holder issue your QCD directly to the Mount Vernon Ladies' Association on your behalf.

Please keep in mind:

In general, your qualified charitable distribution gift is to be used for charitable purposes only, and you cannot receive any goods, services, or benefits in return for your donation. Your QCD gift cannot be used for:

- Memberships
- Pledge Fulfillment
- Admission Fees or Event Tickets
- Event Sponsorships
- Goods Purchased at Charitable Auctions

Please contact us at support@mountvernon.org or 703.799.8647 with any questions you have.

