JOBS PARTNERSHIP

How to make an IRA Qualified Charitable Distribution (QCD) to Jobs Partnership

A tax-wise way to transform lives through meaningful work and a pathway to economic mobility!

If you're 70½ or older, you may be able to direct a Qualified Charitable Distribution (QCD) from your IRA to support Jobs Partnership — without including the distribution in your taxable income (subject to IRS rules). If you're subject to a Required Minimum Distribution (RMD), a QCD may satisfy all or part of that requirement for the year. Please consult your tax advisor about your individual situation.

Step 1 — Contact your IRA custodian

Let your IRA administrator know you'd like to make a Qualified Charitable Distribution. Then choose one of the two giving options below.

Step 2 — Choose how to give

Option A — Give directly to Jobs Partnership

Legal name: Jobs Partnership of Florida, Inc.
Tax ID (EIN): 59-3612893
Mailing address:
2250 Lee Road, Suite 201
Winter Park, FL 32789

See Attachment A: sample letter to Jobs Partnership and sample acknowledgment letter.

Option B — Give through the Jobs Partnership Single Charity Fund at National Christian Foundation

Receiving organization: National Christian Foundation
Fund name: Jobs Partnership Single Charity Fund
NCF fund number: 1410718
Mail checks to:
National Christian Foundation
ATTN: Contribution Services
11625 Rainwater Drive, Suite 500
Alpharetta, GA 30009

See Attachment B: sample instructions for your IRA custodian.

Step 3 — Notify Jobs Partnership

However you give, please let us know your gift is on its way so we can properly acknowledge your generosity.

Conner Bourne, Development Director • (407) 641-0755 x102 • cbourne@jobspartnership.org
Marc Stanakis, President/CEO • (407) 641-0755 x104 • mstanakis@jobspartnership.org

Important reminders

- You must be 70½ or older on the date of your gift.
- Your gift must come directly from your IRA custodian — if it's paid to you first, it generally won't qualify as a QCD.
- QCDs cannot be made from a 401(k) or to a donor-advised fund.
- Please consult your financial or tax advisor before giving.

Thank you for investing in changed lives… and in generations to come.

Attached: Attachment A — sample letter to Jobs Partnership & sample acknowledgment letter. Attachment B — sample instructions for your IRA custodian.

Attachment A — Sample letter to Jobs Partnership

[Donor Name]
[Address]
[City, ST Zip Code]

[Date]

The Jobs Partnership of Florida
2250 Lee Road, Suite 201
Winter Park, FL 32789

Re: Qualified Charitable Distribution (QCD) from IRA

To Whom It May Concern:

I am pleased to inform you that I have made a Qualified Charitable Distribution of **[$ Amount]** from my Individual Retirement Account held at **[IRA Custodian Name]**, made payable to your organization.

In connection with this gift, I intend to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Accordingly, upon receiving this distribution from **[IRA Custodian Name],** please send me a contemporaneous written acknowledgment stating the amount of my gift and confirming that it will not be placed in a donor-advised fund or supporting organization. I've enclosed a sample acknowledgment letter for your convenience, which you're welcome to transfer to your organization's letterhead.

If you have any questions, please feel free to call me at [Contact Phone Number].

Sincerely,

[Donor Name]

Enclosure

Attachment A-1 — Sample acknowledgment letter from Jobs Partnership

Date: _____

[Donor Name]
[Address]
[City, ST Zip Code]

Dear [Donor Name],

Thank you for your recent gift made from your Individual Retirement Account, described as follows:

[$ Amount] — Cash Donation

We are writing to acknowledge that we received your gift directly from your [Custodian Name] IRA and that it is your intention for this gift to qualify as a Qualified Charitable Distribution under Section 408(d)(8) of the Internal Revenue Code.

In that connection, we confirm that Jobs Partnership of Florida is qualified under Section 170(b)(1)(A) of the Internal Revenue Code, and that your gift was not transferred to a donor-advised fund or a supporting organization as described in Section 509(a)(3).

We further confirm that no goods or services of any value were or will be provided to you in connection with this gift.

Please retain this letter with your tax records and share a copy with your tax preparer. Thank you for your generous support of Jobs Partnership.

Sincerely,
Jobs Partnership of Florida

Attachment B — Sample instructions for your IRA custodian

For gifts to the Jobs Partnership Single Charity Fund at National Christian Foundation — provide the following to your IRA custodian:

Please process a Qualified Charitable Distribution (QCD) from my Traditional IRA.

Make the distribution payable to:
National Christian Foundation

For the benefit of:
Jobs Partnership Single Charity Fund
Fund Number: 1410718

Mail to:
National Christian Foundation
ATTN: Contribution Services
11625 Rainwater Drive, Suite 500
Alpharetta, GA 30009

This distribution is intended to qualify as a Qualified Charitable Distribution under Internal Revenue Code Section 408(d)(8).