

**Use the IRA Charitable Rollover to Support**

**Colonial Williamsburg Foundation**

**Tax ID #: 54-0505888**

If you are 70½ or older, you can make a tax-free distribution from your traditional or Roth IRA to Colonial Williamsburg, known as an IRA Qualified Charitable Distribution (QCD) or IRA Charitable Rollover. Benefits include:

* The IRA rollover amount is excluded from your taxable income.
* You may roll over up to $100,000 every year from your IRA as a QCD.
* If you are age 73 or older, the QCD can also count towards your required minimum distribution (RMD).
* New for 2023: You may establish a charitable gift annuity with Colonial Williamsburg of up to $50,000 (limited to only one tax year during your lifetime).

**Making Your IRA Gift**

To make an IRA QCD gift to Colonial Williamsburg, please direct your IRA administrator to mail a check payable to “The Colonial Williamsburg Foundation” to the address below:

The Colonial Williamsburg Foundation

Attn: Special Gifts Administrator

P.O. Box 1776

Williamsburg, VA 23187-1776

**IMPORTANT:**

1. Instruct your IRA administrator to include your name on IRA QCD check.
2. Alert Colonial Williamsburg by contacting Margaret McGraw, Special Gifts Administrator, at (757) 565-8605 or mmcgraw@cwf.org before making an IRA QCD gift, so that we may identify and acknowledge your gift promptly.

**NOTE**: If you are still working and contributing to your IRA, an IRA QCD gift could impact your taxable income. If you are under age 70 ½, you can still use your IRA to support Colonial Williamsburg by making a withdrawal and donating the proceeds after taxes, or by designating Colonial Williamsburg as a beneficiary of your IRA.

**Please consult a qualified advisor before making an IRA gift.**