



Fostering generosity through

QUALIFIED CHARITABLE DISTRIBUTION

IRA QCDs or IRA Charitable Rollovers are an increasingly popular way to support Episcopal's annual fund efforts.

Information for you:

- Donors must be 70 ½ years or older to make a QCD from your IRA.
- Funds must be sent directly to Episcopal from your IRA administrator.
- You can give up to \$100,000 tax-free charitable donations annually, lowering your taxable income, and if you are age 72 or older, helping you meet your required minimum distribution, or RMD.

IRA Administrator Info:

- Tax ID number: 72-0650540
- Make check payable to:
Episcopal School of Baton Rouge
Attn: Development Office
3200 Woodland Ridge Blvd.
Baton Rouge, LA 70816
- Please include the donor's name in the memo line.
- The legal name is Episcopal High School of Baton Rouge.

For questions or further assistance, please contact Katie Thompson at 225.755.2741 or thompsonk@ehsbr.org



EPISCOPAL
SCHOOL OF BATON ROUGE

Supporting community through

DONOR-ADVISED FUNDS

A donor-advised fund, or DAF, is like an investment account for the sole purpose of supporting charitable organizations you care about.

Non-profit Information:

- Tax ID number: **72-0650540**
- Make Checks payable to:
**Episcopal School of Baton Rouge
Attn: Development Office
3200 Woodland Ridge Blvd.
Baton Rouge, LA 70816**
- **Please include the donor's name** on the memo line or in documentation with the check.
- **The legal name** is Episcopal High School of Baton Rouge.

For questions or further assistance, please contact The Development Office at advancement@ehsbr.org or 225.755.2714



EPISCOPAL
SCHOOL OF BATON ROUGE

Investing in the future through

STOCKS OR OTHER SECURITIES

Contact your broker or other advisors and determine what works best for you.

Here you will find everything you and your broker will need to start your gift.

Start your gift of stock or other securities

Provide your broker with the following information:

- Episcopal's broker: **Morgan Stanley**
Attn: **Michelle McNicoll**
225-379-7541
- DTC#: **0015 - Morgan Stanley**
- Acct. #: **784-126768**

Please **notify us** of the following:

- Type of shares
- Number of shares transferred
- The fund-raising campaign, pledge, or program to which to apply the gift(s)

For questions or further assistance, please contact Katie Thompson at thompsonk@ehsbr.org or 225-755-2741.