

How to Give Through a Donor Advised Fund or IRA

San Marino Schools Foundation

There are tax-smart ways to support San Marino public school students beyond cash and stock. If you have a donor advised fund (DAF) or are 70½ or older with an IRA, your gift may go further — for you and for our students.

Donor Advised Fund (DAF)

If you have a donor advised fund through Fidelity Charitable, Schwab Charitable, Vanguard Charitable, a community foundation, or another sponsor, you can recommend a grant to SMSF directly through your fund administrator's online portal.

To recommend a grant, use:

Legal name:	San Marino Schools Foundation
Federal Tax ID (EIN):	95-3507283
Mailing address:	1665 West Drive, San Marino, CA 91108

Most DAF sponsors let you search for us by name or EIN and submit your grant recommendation in just a few clicks.

Because DAF grants are sent directly by your fund administrator, we may not always know who to thank. Please let us know at (626) 299-7014 once you've recommended a gift, so we can acknowledge it properly. Note that DAF gifts are not separately tax-deductible to you, since you already received that deduction when you funded your account.

IRA Qualified Charitable Distribution (QCD)

If you are 70½ or older, you can give directly from your IRA to SMSF through a Qualified Charitable Distribution (QCD). A QCD counts toward your required minimum distribution (RMD) and is excluded from your taxable income — even if you don't itemize deductions.

To make a QCD gift:

1. Contact your IRA custodian and request a Qualified Charitable Distribution.
2. Have the custodian send the distribution directly to:

San Marino Schools Foundation
Tax ID: 95-3507283
1665 West Drive, San Marino, CA 91108

3. Let us know a gift is on its way by calling (626) 299-7014 — custodians don't always include your name, and this is the only way we'll know to thank you.

A QCD must come directly from your IRA administrator to SMSF. Funds distributed to you first and then donated do not qualify for the tax benefit.

Questions about either option? We're happy to help — and we always recommend checking with your financial or tax advisor to see what makes sense for your situation.

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