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| **Procedure Name:** | **Qualified Charitable Distributions (QCD) – Pershing Accounts Only** | **A picture containing text, clipart  Description automatically generated** | |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** | Abbey Pilgrim |

**Description**

Follow these steps if a client wants to request a Qualified Charitable Distribution to a charity, including for their RMD.

**Assumptions**

There is a Pershing account established, whether it is Advisory or non-Advisory.

**Procedure**

1. For a distribution from an IRA:
   1. Use form IRA/ESA Distribution Request which can be found in eForms-Quik!
   2. Fill out applicable sections
   3. In Step 5. Method of Delivery: Select *Third Party Check Request*
2. For a distribution from a non-qualified account:
   1. Use the Third-Party Distribution Request form

**References**

N/A

**Revision History**

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| --- | --- | --- |
| **Revision Date** | **Revised By** | **Revision Notes** |
| 11/14/2022 | Abbey Pilgrim | Procedure Created |
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