



Transferring Funds from your IRA to SMCS Foundation, Inc.

STEP ONE: Contact your IRA custodian and inform them of your intent to make a distribution from your IRA account to the SMCS Foundation. Provide them with your account number and the amount you would like to transfer. The administrator must make the check payable to SMCS Foundation and the check can be mailed directly to the following address:

SMCS Foundation
1050 Zephyr Drive
Neenah, WI 54956

Alternately, the funds may be wired to the SMCS Foundation. Following is the routing information:

Bank: Nicolet National Bank
Acct. Name: St. Mary Catholic Schools Foundation, Inc.
ABA#: 075917937
Acct#: 1444273
Contact/Phone Number: Staci Wied, 855-451-4793

STEP TWO: It is important to notify us that you have requested a charitable distribution. Please let us know the following information:

Name and contact information of IRA Plan Administrator
Dollar (\$) amount of transfer
Where you would like your gift directed

Please send to the address above. Call your IRA administrator with any questions. Once we receive the check from your IRA administrator, the SMCS Foundation will provide a written acknowledgment of your gift in accordance with the provisions of the applicable law.

Thank you for your support of St. Mary Catholic Schools through your generous gift to the SMCS Foundation!