**Sample Request from IRA Owner to IRA Administrator for a Charitable Distribution from an Individual Retirement Account (IRA) to Massachusetts Audubon Society, Inc. and/or a specific sanctuary.**

*Please download and/or print the form, complete it, and email and scan it, or send it by mail to your plan administrator.*

IRA Administrator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*RE: Request for Charitable Distribution from Individual Retirement Account (IRA)*

IRA Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

In the name of: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dear Administrator/To Whom It May Concern:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Please issue a check in the amount of: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(*not to exceed $108,000.00*), payable to:

Massachusetts Audubon Society, Inc.

208 South Great Road

Lincoln, MA 01773

Tax Identification #04-2104702

In your transmittal to Mass Audubon, please give my name and address as the donor of record in connection with the transfer and indicate whether the check is

* for the benefit of Mass Audubon
* or the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mass Audubon Sanctuary.

Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion, or inclusion/deduction with respect to the 20\_\_\_\_ tax year.

If you have questions or need to contact me, I can be reached at: (\_\_\_\_\_)\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Thank you.

Sincerely,

[Your name]