**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.**

[DATE]

[NAME OF IRA PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

(Call your plan provider or go online to determine the most efficient way to send this letter of instruction. We recommend saving a copy for your files.)

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

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

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

Dear Sir or Madam:

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 $100,000.00), 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 so please ensure that the check is postmarked by December 31 of this year.

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

Sincerely,

**[Your name]**