



Audubon Society of Rhode Island

Transfer Instructions for an IRA Charitable Rollover

Sample Letter from Donor Informing the Audubon Society of Rhode Island of Forthcoming Charitable Distribution from IRA Trustee/Administrator

Audubon Society of Rhode Island
Attn: Office of Advancement/Jeffrey Hall
12 Sanderson Road, Smithfield, RI

Dear Mr. Hall:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to the Audubon Society of Rhode Island in the amount of _____ from my plan trustee/administrator (name of IRA trustee/administrator) _____

It is my intention to comply with current policy that permits a rollover directly from an IRA to a qualified public charity.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by the Audubon Society of Rhode Island in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I will receive an acknowledgement of this distribution, I understand that there is no federal charitable income tax deduction for this distribution.

[Optional]: I intend for my gift to the Audubon Society of Rhode Island to be used for the following purpose: _____ [gift designation, if any].

If you have any questions or need to contact me, I can be reached at the following telephone number: _____.

Sincerely,
[Your name]

Connecting People With Nature