



Audubon Society of Rhode Island

Transfer Instructions for an IRA Charitable Rollover
Sample Request Letter from Plan Owner to Administrator for a Charitable Distribution from an IRA

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Current policy permits a rollover directly from an IRA to a qualified public charity. As the owner of IRA account # _____ that is in the custody of your organization, I request that you transfer from that account the sum of \$_____ to the Audubon Society of Rhode Island. The federal tax ID number for the Audubon Society of Rhode Island is 05-0265675.

Distributions should be made payable to:

Audubon Society of Rhode Island
Attn: Office of Advancement
12 Sanderson Road, Smithfield, RI
Tax ID# 05-0265675

You can reach the Audubon Society of Rhode Island Advancement Office by calling (401) 949-5454 ext. 3017, or by email at jhall@asri.org. In your transmittal to the Audubon Society of Rhode Island, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have any questions or need to contact me, I can be reached at _____ [telephone number or email address]. Thank you for your assistance in this matter.

Sincerely, [Plan owner]

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