

## 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:

Please accept this letter as my request to make a direct charitable distribution in the amount of \$\_\_\_\_\_ from my Individual Retirement Account # \_\_\_\_\_ [account number] as provided by Sec. 1201 of the Pension Protection Act of 2006, section 205 of the Tax Extenders and Alternative Minimum Tax Relief Act of 2008 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Distributions should be made payable to:

The Nature Conservancy  
Attn: Treasury Department  
4245 North Fairfax Drive  
Arlington, Virginia 22203-1606  
Tax ID# 53-0242652

My contact at The Nature Conservancy is Mr. Nev Major, Deputy Director of Gift Planning Administration, who can be reached by calling 703-841-4859 or toll-free 877-812-3698, or by email at [jmajor@tnc.org](mailto:jmajor@tnc.org).

In your transmittal to The Nature Conservancy, 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 #]. Thank you for your assistance in this matter.

Sincerely,

[Plan owner]

**Sample Letter from Donor Informing The Nature Conservancy of  
Forthcoming Charitable Distribution from IRA  
Trustee/Administrator**

The Nature Conservancy  
Attn: Nev Major, Deputy Director of Gift Planning Administration  
4245 North Fairfax Drive  
Arlington, Virginia 22203-1606

Dear Mr. Major,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to The Nature Conservancy in the amount of \$\_\_\_\_\_ from my plan trustee/administrator, \_\_\_\_\_ [name of IRA trustee/administrator].

It is my intention to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006, section 205 of the Tax Extenders and Alternative Minimum Tax Relief Act of 2008 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

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 Nature Conservancy in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I 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 Nature Conservancy 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 \_\_\_\_\_ [telephone #].

Sincerely,

[Your name]

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**We would be happy to answer any questions you may have about this material. Please call our Gift Planning Department toll-free at (877) 812-3698.**