



Transferring an IRA Charitable Distribution

Sample Request Letter from Plan Owner to IRA 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 Adirondack Mountain Club, Inc. (ADK) located in Lake George, New York. The federal tax ID number for Adirondack Mountain Club is 15-0586270.

Distributions should be made payable to:

Adirondack Mountain Club
Attn: Development Office
814 Goggins Road
Lake George, New York 12845
Tax ID# 15-0586270

You can reach ADK's development department by calling 518-668-4447, ext. 23 or by email at lynn@adk.org. In your transmittal to ADK, please list 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]

**Sample Letter from Donor Informing
Adirondack Mountain Club of Forthcoming
Charitable Distribution from IRA Trustee/Administrator**

Adirondack Mountain Club
Attn: Development Office
814 Goggins Road
Lake George, New York 12845

To Whom It May Concern:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to Adirondack Mountain Club 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 Adirondack Mountain Club 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 Adirondack Mountain Club 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 number] or _____ [email address].

Sincerely,
[Your name]