

## QUALIFIED CHARITABLE DISTRIBUTION REQUEST FORM

Use this form to request a Qualified Charitable Distribution (“QCD” or “IRA Rollover”) from your IRA. Retirement plan participants or their beneficiaries who have attained age 70-1/2 or older may make tax-free distributions from a Traditional or Roth IRA and donate the amount distributed to an eligible tax-exempt charitable organization. The total of all QCDs for a single tax year cannot exceed \$100,000. The QCD amount can be used toward satisfying your Required Minimum Distribution (“RMD”) for the tax year. The QCD will be reported to the IRS on form 1099-R as a normal distribution (Code 7) based on your age. You must document the tax-free qualification to the Internal Revenue Service on your federal income tax return. Please visit the IRS web site [www.irs.gov](http://www.irs.gov), or contact a professional tax advisor for more information.

**Please contact your Custodian to determine whether you need to indicate which investments should be liquidated to make this distribution, and whether a Medallion guarantee is required. Your custodian may require that its own forms be used to request this distribution.**

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### Request to IRA Custodian:

**Mail, fax, or hand-deliver your request to:**

**Company Name:** Audubon Center of the North Woods

**Address:** PO Box 530, 54165 Audubon Drive

**City:** Sandstone      **State:** Minnesota      **Zip code:** 55072-0530

**Attention:** Finance Manager

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I. **Participant Information** – You must be at least 70-1/2 years old to request a QCD.

Name: \_\_\_\_\_ Daytime Telephone: \_\_\_\_\_

Account Number: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Type of Account (excluding SEP or SIMPLE IRAs)

\_\_\_ Traditional/Rollover IRA                      \_\_\_ Roth IRA

\_\_\_ Beneficiary inherited Traditional IRA      \_\_\_ Beneficiary inherited Roth IRA

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II. **Distribution Instructions** (Complete Sections A and B)

A. Total Distribution Amount (Not to exceed the allowable limit of \$100,000)

\_\_\_ Use my calculated RMD amount but not more than \$100,000.

\_\_\_ Process a total distribution of \$ \_\_\_\_\_.

\_\_\_ I waive tax withholding on this distribution. (Any amounts withheld are reportable and taxable.)

B. Please mail or transfer the distribution to the Audubon Center of the North Woods, a Minnesota nonprofit corporation:

1. Amount: \$ \_\_\_\_\_ or \_\_\_\_\_ % of the distribution proceeds to:

Jolene Palme

Audubon Center of the North Woods

P.O. Box 530

54165 Audubon Drive

Sandstone, MN 55072

EIN: \_\_\_\_\_

Or transfer directly to the account of the above charity:

Bank: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Representative contact name and information: \_\_\_\_\_

**III. Participant Authorization**

I certify that I am the Participant authorized to make this election and that all information provided is true and accurate. I further authorize the Custodian to release my identity to any charity receiving a QCD hereunder.

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Participant's signature:

Date: