



10 Smith Lane, Eastham, MA 02642-2671 • 508-240-2255
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IRA OPTIONS – SAMPLE LANGUAGE

Are you a Wild Care, Inc. enthusiast over 70½ with an IRA?
Would you like to support the organization in a tax-wise way?
The Charitable IRA Rollover may be just the thing...

Now that Congress has made the IRA rollover permanent, you can make thoughtful contributions to Wild Care, Inc., satisfy your required minimum distribution (RMD), and avoid income tax you would otherwise have to pay on mandatory withdrawals. This benefit is available to itemizers and non-itemizers alike and requires only a few simple steps.

Tax-Free IRA Rollover Permanently Extended

The Trade Facilitation and Trade Enforcement Act of 2015 made the “IRA Charitable Rollover” a permanent giving opportunity for qualified donors. Under this legislation, qualified donors may make outright gifts of up to \$100,000 to charity from their IRA, and avoid taxation on the distribution. For gifts to be counted toward the required minimum distribution (RMD) for 2017, transfers must be made by December 31, 2017.

To benefit from this gift opportunity, the following qualifications must be met:

The gift must be transferred directly from the IRA account, by the IRA administrator to Putney.
Donors with check-writing ability for their IRAs may use this feature to complete their gift.

- Donor must be age 70½ or older at the time of transfer.
- The maximum amount a donor may transfer per year is \$100,000.
- The gift must be outright. Gifts to donor advised funds or to life income vehicles do not qualify.
- The gift must be transferred directly from the IRA account by the IRA administrator to Wild Care, Inc. Donors with check-writing ability for their IRAs may use this feature to complete their gifts.

They will thank us simply by their presence



We use recycled paper.



A sample letter to facilitate this tax-wise way to support Wild Care, Inc. and take advantage of tax-free distributions is listed below on page 3. For more information, please contact:

Stephanie Ellis, Executive Director
Wild Care, Inc.
10 Smith Lane
Eastham, MA 02642
(508) 240-2255
sellis@wildcarecapecod.org





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Sample request from Plan Owner to IRA Plan Administrator authorizing charitable distribution to Wild Care, Inc. from Individual Retirement Account

RE: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # *(Account Number)*.

Please issue a check in the amount of \$_____ payable to the organization at the address below:

Wild Care, Inc.
Attn: Stephanie Ellis, Executive Director
10 Smith Lane
Eastham, MA 02642

Wild Care's Federal Tax Identification number is 04-3234724.

In order to qualify for 2017 treatment, it is essential that this distribution be received by Wild Care, Inc. no later than December 31, 2017.

In your transmittal to Wild Care, Inc., please give 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)* and *(email address)*. You can also reach Stephanie Ellis, Executive Director at Wild Care, Inc. by telephone at 508-240-2255 or by e-mail at sellis@wildcarecapecod.org

Thank you for your prompt assistance in this matter.

Sincerely,
(Plan Owner)
(Home address)

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