



10 Smith Lane, Eastham, MA 02642-2671 • 508-240-2255
info@wildcarecapecod.org • wildcarecapecod.org

IRA OPTIONS – SAMPLE LANGUAGE

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

Thanks to Congressional action, you can make a thoughtful contribution to Wild Care, Inc. to 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.

The basic requirements for RMD's directed toward a charity, are quite simple:

- RMD's must start at age 70 ½ for individuals reaching this age by 12/31/19, and must begin at age 72 for individuals reaching this age after 12/31/19.
- The maximum amount a donor may transfer is \$100,000 per year for an individual, and \$200,000 per year for a married couple (separate \$100,000 gifts from each spouse's IRA).
- The gift must be outright. Gifts to donor advised funds, or to life income vehicles, do not qualify.
- The IRA administrator must transfer the gift directly from the IRA account, to Wild Care, Inc. Also, donors with check-writing ability for their IRA's may use this feature to complete their gifts.
- Gifts must be made prior to December 31st of each year to qualify for favorable tax treatment in that year.

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

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

They will thank us simply by their presence



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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 2020 tax treatment, it is essential that this distribution be received by Wild Care, Inc. no later than December 31, 2020.

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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