



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:

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 The Nature Conservancy located in Arlington, Virginia. The federal tax ID number for The Nature Conservancy is 53-0242652.

Distributions should be made payable to:

The Nature Conservancy
Attn: Gift Planning
4245 North Fairfax Drive, Suite 100
Arlington, Virginia 22203-1606
Tax ID# 53-0242652

You can reach The Nature Conservancy's Gift Planning department by calling (877) 812-3698, or by email at legacy@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 number or email address]. 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: Gift Planning
4245 North Fairfax Drive, Suite 100
Arlington, Virginia 22203-1606

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 The Nature Conservancy 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 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 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 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 the following telephone number: _____.

Sincerely,
[Your name]