



Thank you for considering making a charitable distribution to the San Juan Preservation Trust from your Individual Retirement Account (IRA).

Following is a sample instruction letter you may use to request an IRA charitable gift transfer from your IRA plan administrator, as well as a sample letter to notify the San Juan Preservation Trust of your gift.

Please contact Kristin Buckley, Director of Philanthropy, at (360) 317-3055 or kristin@sjpt.org if you have any questions about IRA charitable gift transfers. The San Juan Preservation Trust is not able to provide tax advice; donors are encouraged to seek professional tax counsel.

Sample Request Letter from Donor to Administrator for a Charitable Distribution from an IRA

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution in the amount of \$_____ from my Individual Retirement Account # _____ [account number].

This distribution should be made payable to:

San Juan Preservation Trust

PO Box 759

Friday Harbor, WA 98250

Tax ID# 91-1078355

Angela Anderson, Executive Director

Funds may be wire-transferred as follows:

The Northern Trust Company

Routing Number: 07 100 0152

Account Number: 5186011000

Account Name: The San Juan Preservation Trust - Gift Account

Contact: Lori White, (206) 381-8348 or lw35@ntrs.com.

My contact at the San Juan Preservation Trust is Kristin Buckley, Director of Philanthropy, who can be reached by calling (360) 317-3055 or by e-mail at kristin@sjpt.org.

In your transmittal to the San Juan Preservation Trust, 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 #].

Thank you for your assistance in this matter.

Sincerely,

[Plan owner]

Sample Letter from Donor Informing the San Juan Preservation Trust of Forthcoming Charitable Distribution from IRA Trustee/Administrator

San Juan Preservation Trust
Attn: Kristin Buckley, Director of Philanthropy
PO Box 759
Friday Harbor, WA 98250

Dear Ms. Buckley,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to the San Juan Preservation Trust in the amount of \$_____ from my plan trustee/administrator, _____ [name of IRA trustee/administrator].

It is my intention that my IRA rollover gift comply with the “qualified charitable distribution requirements” of the Internal Revenue Code.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by the San Juan Preservation Trust in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I 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 San Juan Preservation Trust 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 #].

Sincerely,

[Your name]

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