WESTWIND

5933 NE Win Sivers Dr, Ste 202
Portland, OR 97220
Tax ID (EIN) 20-1627314

IRA Charitable Rollover Instructions

To Plan Administrator | Qualified Charitable Distribution (QCD) to Westwind Stewardship Group

> **How to use this letter:** fill in the blanks, sign, and send it to your IRA custodian (not to Westwind). Many custodians have their own QCD form; this letter can go with it. The money must go directly from your custodian to Westwind to qualify.

TO: Plan Administrator _____

FROM: Plan Owner _____

ADDRESS: _____

EMAIL: _____ **PHONE:** _____

ACCOUNT #: _____ **DATE:** _____

RE: Request for Qualified Charitable Distribution from Individual Retirement Account

Section 408(d)(8) of the Internal Revenue Code permits an IRA owner age 70 1/2 or older to make a qualified charitable distribution directly from an IRA custodian to a qualified charity. As the owner of the IRA account listed above, which is in the custody of your organization, I request that you transfer from that account the amount below.

AMOUNT: $ _____

Please issue a check payable to:

Westwind Stewardship Group (Tax ID 20-1627314)

Mail the check to: Westwind Stewardship Group, 5933 NE Win Sivers Dr, Ste 202, Portland, OR 97220

I would like my gift used for (check one):

☐ Camperships ☐ Camp Maintenance ☐ General Operations

In memory or honor of (optional): _____

Please accept this letter as my request to make a direct qualified charitable distribution from my IRA. In your transmittal to the charity, please include my name and address as the donor of record. Please send me a copy of the transmittal. If you have questions, I can be reached at the contact information above.
Sincerely,

_____

Signature

Questions about giving to Westwind?

Andy Lindberg, Executive Director | 541-994-2383 | andy@westwind.org

Please let us know your gift is on its way so we can thank you. This letter is general information, not legal or tax advice; please consult your tax advisor or attorney.