

Charitable IRA Rollover Intention Form



If you're at least 70 ½ years old, you may make a tax-free charitable gift to Population Connection directly from your traditional IRA. Your charitable gifts up to \$100,000 will be considered part of your required minimum distribution (RMD) for the year.

To qualify for a Special Tax-Free Charitable IRA Rollover with Population Connection, please make sure:

- You will be at least 70 ½ years of age on the date of your gift.
- Your giving does not exceed a total of \$100,000 each year from your traditional IRA(s).
- You are giving from a traditional IRA and NOT from any other type of retirement plan (such as 401(k), 403(b), 457, Keogh, ESOP, etc.).
- You instruct your financial institution to make the contribution directly payable to Population Connection.

Next, please send us your information so that we can properly attribute your gift as an IRA charitable rollover gift.

Name(s) (Please Print): _____

Address: _____

City, State, ZIP: _____

Email Address(es): _____

Preferred Telephone: _____ Best times to reach you: _____

Financial Institution managing your IRA: _____

Annual Contribution: _____

For questions or more information:

Contact: Jennifer Lynaugh

Website: www.popconnect.org/give/#other

Phone: (202) 974-7710

Email: jennifer@popconnect.org

Please return to:

Population Connection

Development Office

5005 Texas Street, Suite 205

San Diego, CA 92108

Charitable IRA Rollover

Sample Letter of Instruction



Date: _____

Your Name and Address:

Name and Address of IRA Administrator:

Re: Charitable IRA Rollover – distribution to Population Connection

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from _____
_____ (name on IRA account), account # _____,
to Population Connection. This distribution is intended to be an IRA Charitable Rollover, as authorized by
Section 408(d)(8) of the Internal Revenue Code.

Please issue a check in the amount of \$ _____, payable to Population Connection, and
send the check to the following address:

Population Connection
PO Box 97129
Washington, DC 20090-7129
Phone: (202) 974-7710
Fax: (202) 332-2302

Population Connection is a 501(c)(3) nonprofit that is qualified to receive charitable IRA rollovers. It is
my intention to have this transfer serve as a Qualified Charitable Distribution that will qualify for
exclusion from my taxable income during the 20__ tax year.

Thank you for your prompt attention to this matter. Please contact me with any questions at
(phone)_____.

Sincerely,

(Your name as listed on the IRA)