

Letter for IRA Donation to John Muir Land Trust

Date: _____

Broker Name: _____

Broker Address: _____

RE: Request for Charitable Distribution from Individual Retirement Account

Dear IRA Custodian:

Federal law permits the account holder of an IRA or Roth IRA who is 70 1/2 or older to make a Qualified Charitable Distribution ("QCD") directly from their IRA/Roth IRA to a qualified public charity.

As the owner of IRA Account # _____ that is in the custody of your organization, I request that you make the following QCD to John Muir Land Trust (JMLT), at the mailing address listed below.

Please note that John Muir Land Trust is a nonprofit corporation that is qualified to receive direct, tax-free rollover charitable contributions from IRA assets. The taxpayer identification number of JMLT is **68-0194652**.

Please issue a check in the amount of \$ _____ payable to John Muir Land Trust and send it to the address below:

John Muir Land Trust
P.O. Box 31
Martinez, CA 94553

It is my intention that the above listed gift be treated as a QCD and that the same be used to satisfy, in whole or in part, my Required Minimum Distribution (RMD) in the year of transfer, if applicable.

It is my intention to have this distribution qualify for income tax exclusion. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2023.

In your transmittal to John Muir Land Trust, please include my name and address as the donor of record in connection with this transfer and indicate that I want the gift to support this designation: _____.

Please copy me on your transmittal.

If you have any questions or need to contact me, I can be reached at _____. Thank you for your assistance in this matter.

Sincerely,

IRA Owner

cc: John Muir Land Trust
P.O. Box 31
Martinez, CA 94553

