

# Charitable IRA Gifts

## 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 qualified charitable distributions (QCDs) up to \$108,000 will be considered part of your required minimum distribution (RMD) for the year.

**To qualify for a Special Tax-Free Charitable IRA distribution 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 \$108,000 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 QCD gift.**

Name(s) (Please Print): \_\_\_\_\_

Address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Email Address(es): \_\_\_\_\_

Preferred Telephone: \_\_\_\_\_ Best times to reach you: \_\_\_\_\_

Financial Institution managing your IRA: \_\_\_\_\_

Anticipated Annual Contribution: \$ \_\_\_\_\_

For questions or more information:

**Victoria Wright, Director of Planned Giving**

**Website: [www.popconnect.org/give/#other](http://www.popconnect.org/give/#other)**

**Phone: (202) 974-7756**

**Email: [vwright@popconnect.org](mailto:vwright@popconnect.org)**

Please return this form to:

**Population Connection**

**ATTN: Victoria Wright**

**PO Box 97129**

**Washington, DC 20090-7129**

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## Sample Letter of Instruction



Date: \_\_\_\_\_

Your Name and Address:

Name and Address of IRA Administrator:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **Re: Charitable IRA QCD 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  
ATTN: Victoria Wright  
PO Box 97129  
Washington, DC 20090-7129  
Phone: (202) 974-7756  
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)