

Instructions for a direct transfer from an Individual Retirement Account (Qualified Charitable Distribution)

- ✓ **Please note:** IRA transfers benefit **Annual Fund SHARE** unless another designation is indicated on the check or accompanying paperwork from your IRA administrator
- ✓ Use a traditional Individual Retirement Account or other qualified plan (inherited, inactive SEP or SIMPLE)
- ✓ Be 70 ½ years of age or older (IRS publication 590-B)
- ✓ Use your IRA provider's forms (or process) to request a direct transfer from your IRA to The Rotary Foundation by check or wire using the instructions below
- ✓ Alternatively, if you can write a check payable to The Rotary Foundation from your IRA account, send it to the address below
- ✓ **Please ensure that your name and Rotary ID are included so that we may properly credit your gift**
- ✓ Do not expect a charitable tax receipt (or take a tax deduction) because the transferred amount should not be treated as taxable income
- ✓ Use The Rotary Foundation the EIN: 36-3245072

Additional considerations

If you prefer a designation other than AF-SHARE, please request that your administrator include that designation **on the check or paperwork** to ensure it is processed in a timely manner. For example, you can include:

- A named endowed fund number E00000
- A Rotary program name such as PolioPlus, Disaster Response, Peace Centers, or any of the seven areas of focus

Reach out to your Rotary staff liaison or giftadministration@rotary.org for help

Where, how, and when to send

Make your request in time for the payment to be **received** at the Rotary Foundation **before 31 December** each year.

Checks should be sent to:

THE ROTARY FOUNDATION
14280 COLLECTIONS CENTER DRIVE
CHICAGO, IL 60693

Wire transfer instructions are provided upon request by giftadministration@rotary.org

Note: Qualified Charitable Distribution benefits do not apply for gifts directed to a Donor Advised Fund or to fund a Life Income Agreement. To speak to a Planned Giving Officer about a gift to a Donor Advised Fund or one that pays you and your loved one lifetime payments, please contact plannedgiving@rotary.org