



IRA QUALIFIED CHARITABLE DISTRIBUTION (QCD) FORM

IRA QCDs or IRA Charitable Rollovers are an easy way for donors 70 ½ or older to support the The Retreat. You can make up to \$100,000 in tax-free charitable distributions annually, lowering your taxable income, and, if you're age 72 or older, helping you to meet your minimum distribution requirement.

To initiate a qualified charitable distribution from your IRA to The Retreat, your IRA trustee will need the following information:

Legal name: The Retreat, Inc.
Taxpayer ID: 11-2862256
Address: 13 Goodfriend Drive
East Hampton, NY 11937

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when the The Retreat receives the QCD gift from my financial institution, it will provide me with a written acknowledgment of the gift date and amount, stating no goods or services were transferred to me in consideration for the gift.

In your transmittal to the The Retreat, please indicate my name and address as the donor of record and copy me on your correspondence in connection with this transfer. It is my intention to have this transfer qualify for exclusion during this tax year.

Donor's signature: _____ Date: _____

Printed Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Email: _____

IRA gift amount: \$ _____

Name of IRA financial institution: _____

**Please return this form to your IRA trustee and instruct him or her
to send the form and your IRA charitable rollover gift to:**

The Retreat
Attn: Vanessa Petruccelli, Dev. Director
13 Goodfriend Drive
East Hampton, NY 11937
vanessa@theretreatinc.org
631-329-4398