



## 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: Development Director  
13 Goodfriend Drive  
East Hampton, NY 11937  
developmentdirector@theretreatinc.org  
631-329-4398