



GIFT PLANNING

When you make a Qualified Charitable Distribution to Earthjustice, you help us take on the most important challenges of our time—and stick with them until we win. **Follow this checklist of steps to make your Qualified Charitable Distribution.**

Request a Qualified Charitable Distribution Form

Get started by requesting a distribution form from your IRA custodian.

Complete Your Distribution Form

Print and fill in your Distribution Form. If you would like to make a gift to Earthjustice, please use the information below to designate your gift.

Earthjustice
50 California Street, Suite 500
San Francisco, CA 94111

- Please note your information will NOT be shared with Earthjustice unless you ask your custodian to notify us of your gift (see attached letter).

Sign Your Distribution Form

Sign and date the attached letter of instructions to ensure you receive acknowledgement of your gift for your tax records. Find a local Medallion signature location (most banks, credit unions, and other financial institutions), and sign and date the form in the presence of a Medallion guarantor.

Mail to Your Custodian

Send your distribution form and the attached letter of instructions to your custodian.

- It usually takes 5-10 business days from the day your form is received by your IRA custodian to the day the charity receives the check. The end-of-year period is especially busy for IRA custodians and charities. **If you are trying to complete your QCD for the current tax year, it is best to send these out prior to December 1.**

Let Us Know

Most fund holders will not identify the donor the IRA Rollover gift comes from, meaning that we won't know who made the gift or if there is a special intent for that gift. **If you let us know about it ahead of time, we can ensure your gift is used in the way you intend.**

Disclaimer: This information is not intended as legal, accounting or other professional advice. For assistance in legacy planning, consult an attorney for legal advice or the services of a qualified professional.



EARTHJUSTICE

BECAUSE THE EARTH NEEDS A GOOD LAWYER

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Letter to notify your custodian:

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____, as provided by the Protecting Americans from Tax Hikes Act of 2015.

Please issue a check in the amount of \$_____ payable to Earthjustice and mail it to:

Earthjustice
50 California Street, Suite 500
San Francisco, CA 94111

Earthjustice's tax identification number is 94-1730465.

In your transmittal to Earthjustice, please include my name and address as the donor of record in connection with this distribution. Please copy me on your transmittal.

It is my intention to have this transfer qualify for the 20__ tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20__.

If you have any questions or need to contact me, I can be reached at _____ [provide your telephone number or email address].

Thank you for your assistance in this matter.

Sincerely,

Your Name
Your Address

Disclaimer: This information is not intended as legal, accounting or other professional advice. For assistance in legacy planning, consult an attorney for legal advice or the services of a qualified professional.