



Charitable IRA Rollover Gift Initiation Form

To initiate a qualified charitable distribution from your IRA to the Metroparks Toledo Foundation, your IRA trustee will need the following information:

Legal name: Metroparks Toledo Foundation
Taxpayer ID: 23-7425773
Address: 5100 W. Central Avenue, Suite A
Toledo, Ohio 43615

As the owner of IRA account _____ that is in the custody of your organization, I request that you transfer from that account the sum of \$ _____ to the Metroparks Toledo Foundation, 5100 W. Central Avenue, Suite A, Toledo, Ohio 43615. The Treasury Tax ID Number for the Metroparks Toledo Foundation is: 23-7425773.

It is my intention to make a Qualified Charitable Distribution (QCD) to the Metroparks Toledo Foundation from my IRA, which may fulfill part or all of my IRA required minimum distribution for this year. It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when the Metroparks Toledo Foundation 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 Metroparks Toledo Foundation, 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: _____.

This letter is sufficient authorization for you to make this QCD gift. However, if you require any further documents, please forward those to me for my signature.

Cordially yours,

Donor's signature: _____ Date: _____

Printed Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Email: _____

IRA gift amount: \$ _____

Name of IRA financial institution: _____

I would like my gift to be anonymous: YES NO