



## Legacy Giving

## Roll Over Your IRA for Wildlife

### An easy way to help San Diego Zoo Wildlife Alliance®

If you are 70½ or older, rather than simply taking your withdrawal this year, you can direct your individual retirement account (IRA) administrator to distribute a gift from your IRA to San Diego Zoo Wildlife Alliance (SDZWA). Doing so will reduce your taxable income, even if you do not itemize, and any amount you transfer may count against your required minimum distribution (RMD). You can direct as much as \$100,000 each year.



### Making an IRA Rollover Gift Is Easier Than Ever

- Contact your IRA administrator. (See reverse side for sample letter.) Because of the popularity of the rollover, most administrators provide forms and a procedure to help you make a rollover gift.
- You can direct a transfer of up to \$100,000 to be made this year from your IRA to SDZWA.
- Note: Because you are not claiming the transferred amount as income, you will not receive an income tax deduction for your gift.
- Individual retirement accounts do not allow the donor to receive any benefit in return for the charitable donation.

#### TAKING YOUR RMD

- You pay income tax on your distribution
- You may not need or want the money
- Your tax dollars go to the government
- You are limited by the RMD rules

VS.

#### MAKING AN IRA GIFT

- You will pay no income tax on your gift
- You can save wildlife
- Your gift can help build your charitable legacy
- You can use your IRA in the way you want

SAN DIEGO ZOO WILDLIFE ALLIANCE | PO BOX 120551 SAN DIEGO, CA 92112-0551 | (619) 557-3947 | DONATIONS@SDZWA.ORG | ZOOLEGACY.ORG

The Zoological Society of San Diego (tax ID # 95-1648219) is a nonprofit 501(c)(3) corporation doing business as San Diego Zoo Wildlife Alliance, San Diego Zoo, and San Diego Zoo Safari Park. This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation. © 2021 San Diego Zoo Wildlife Alliance. All rights reserved.

# Sample Request From Donor to IRA Administrator for Charitable Distribution

[Date]

[IRA Administrator]  
[Address]

RE: Request for Charitable Distribution from IRA

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account [# \_\_\_\_\_] as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of [\$ \_\_\_\_\_] payable to the Zoological Society of San Diego and mail it to:

Zoological Society of San Diego  
Development Department  
P.O. Box 120551  
San Diego, CA 92112

The Zoological Society of San Diego's tax identification is #95-1648219.

In your transmittal to the Zoological Society of San Diego, please include my name and address as the donor of record in connection with this transfer.

It is my intention that the above listed gift be treated as a qualified charitable distribution (QCD) and that the same be used to satisfy, in whole or in part, my Required Minimum Distribution (RMD) in [year], if applicable.

If you have any questions or need to contact me, I can be reached at [\_\_\_\_\_].

Thank you for your assistance in this matter.

Sincerely,

[Include your name and address]