



Kathleen Spiess
Development Department
630-725-2470
kspiess@mortonarb.org
4100 Illinois Route 53
Lisle, IL 60532

IRA Charitable Rollover

The now-permanent Charitable IRA Rollover provision allows friends of The Morton Arboretum to reduce their taxable income, achieve charitable giving goals, and satisfy their required minimum distribution – all in one transaction. If you are over age 70 ½, you can donate up to \$100,000 from your IRA directly to the Arboretum without triggering any federal income taxes.

Below is language you can use* to notify your IRA Administrator of your intention to make a charitable distribution from your IRA to The Morton Arboretum via check or wire transfer.

*Your IRA Administrator may require additional forms or documentation. Please contact your Administrator or financial advisor to ensure that all documentation is complete.

Please contact:

The Morton Arboretum
Kathleen Spiess
Development Department
630-725-2470
kspiess@mortonarb.org

The information presented in this literature is not intended as legal or tax advice.

Instructions for IRA Distribution by Check

Please forward a copy of the below form to Kathleen Spiess. The postmark on the envelope from your IRA Administrator will act as the date of your gift.

Date
Address of IRA Administrator

Dear Sir or Madam:

Please accept this letter as authorization to make a charitable distribution from my Individual Retirement Account # _____.

Please issue a check made payable to The Morton Arboretum in the amount of \$_____, and send it to:

Kathleen Spiess
Development Department
630-725-2470
kspiess@mortonarb.org

These funds are to be used for the purpose of _____.

Please include my name and address as the donor of record for this transfer within your correspondence to The Morton Arboretum. Additionally, please send a copy to me for my own documentation.

If you have any questions or need additional information, please contact me at the below number.

Thank you for your prompt assistance with this transfer.

Sincerely,

[SIGNATURE OF IRA OWNER]

cc: Kathleen Spiess, Development Department

Instructions for IRA Distribution by Wire Transfer

Please forward a copy of the below form to Kathleen Spiess. The postmark on the envelope from your IRA Administrator will act as the date of your gift.

Date
Address of IRA Administrator

Dear Sir or Madam:

Please accept this letter as authorization to make a charitable distribution from my Individual Retirement Account # _____.

Please execute a wire transfer in the amount of \$_____ to The Morton Arboretum with the following info:

Contact Kathleen Spiess for transfer information.

These funds are to be used for the purpose of _____.

Please include my name and address as the donor of record for this transfer within your correspondence to Morton. Additionally, please send a copy to me for my own documentation.

If you have any questions or need additional information, please contact me at the below number.

Thank you for your prompt assistance with this transfer.

Sincerely,

[SIGNATURE OF IRA OWNER]

cc: Kathleen Spiess, Development Department