Instructions for a direct transfer from an Individual Retirement Account (Qualified Charitable Distribution)

✓ Please note: IRA transfers benefit Annual Fund SHARE unless another designation is indicated on the check or accompanying paperwork from your IRA administrator

✓ Use a traditional Individual Retirement Account or other qualified plan (inherited, inactive SEP or SIMPLE)

✓ Be 70 ½ years of age or older (IRS publication 590-B)

✓ Use your IRA provider’s forms (or process) to request a direct transfer from your IRA to The Rotary Foundation by check or wire using the instructions below

✓ Alternatively, if you can write a check payable to The Rotary Foundation from your IRA account, send it to the address below

✓ Please ensure that your name and Rotary ID are included so that we may properly credit your gift

✓ Do not expect a charitable tax receipt (or take a tax deduction) because the transferred amount should not be treated as taxable income

✓ Use The Rotary Foundation the EIN: 36-3245072

Additional considerations

If you prefer a designation other than AF-SHARE, please request that your administrator include that designation on the check or paperwork to ensure it is processed in a timely manner. For example, you can include:

▪ A named endowed fund number E00000
▪ A Rotary program name such as PolioPlus, Disaster Response, Peace Centers, or any of the seven areas of focus

Reach out to your Rotary staff liaison or giftadministration@rotary.org for help

Where, how, and when to send

Make your request in time for the payment to be received at the Rotary Foundation before 31 December each year.

Checks should be sent to:

THE ROTARY FOUNDATION
14280 COLLECTIONS CENTER DRIVE
CHICAGO, IL 60693

Wire transfer instructions are provided upon request by giftadministration@rotary.org

Note: Qualified Charitable Distribution benefits do not apply for gifts directed to a Donor Advised Fund or to fund a Life Income Agreement. To speak to a Planned Giving Officer about a gift to a Donor Advised Fund or one that pays you and your loved one lifetime payments, please contact plannedgiving@rotary.org