



# CHARITABLE DISTRIBUTION REQUEST

The term IRA will be used to mean Traditional IRA and Roth IRA, unless otherwise specified.



AGFinancial<sup>SM</sup>

## PART 1. IRA OWNER

Name (First/Mi/Last) \_\_\_\_\_  
 Social Security Number \_\_\_\_\_  
 Date of Birth \_\_\_\_\_ Phone \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Account Number \_\_\_\_\_ Suffix \_\_\_\_\_

### ACCOUNT TYPE (Select one)

Traditional IRA  Roth IRA

## PART 2. IRA TRUSTEE OR CUSTODIAN

To be completed by the IRA trustee or custodian

Name \_\_\_\_\_ AGCU, Custodian/AGFinancial, Trustee  
 Address Line 1 \_\_\_\_\_ Attn: Investments  
 Address Line 2 \_\_\_\_\_ 3900 S. Overland Ave.  
 City/State/ZIP \_\_\_\_\_ Springfield, MO 65807  
 Phone \_\_\_\_\_ 866.453.7143 Organization Number \_\_\_\_\_

## PART 3. CHARITABLE DISTRIBUTION REQUIREMENTS

To be a qualified charitable distribution, the following statements must be true.

- I will have attained age 70½ or older as of the date of this distribution.
- The distribution meets the deductibility requirements under Internal Revenue Code Section (IRC Sec.) 170 and I certify that I will not receive any additional benefit from the receiving organization in return for this charitable donation.
- This distribution consists entirely of pretax assets from the IRA.
- The amount of the charitable distribution from this IRA, when combined with all other qualified charitable distributions I will be taking in the current year, will be less than or equal to the allowable limit (generally \$100,000 potentially reduced by deductible contributions made for a year in which I was age 70½ or older).
- The receiving organization is a church, educational organization, medical organization, private foundation, or other charitable organization listed under IRC Sec. 170(b)(1)(A).

If this is a qualified charitable distribution to a split-interest entity (i.e., charitable gift annuity, charitable remainder unitrust, or charitable remainder annuity trust), the following statements must also be true.

- I have not previously made a distribution to a split-interest entity.
- The distribution to the split-interest entity does not exceed \$50,000 (subject to possible cost-of-living adjustments).
- No person holds an income interest in the split-interest entity other than the individual for whose benefit the account is maintained, the spouse of the individual, or both.
- The income interest in the split-interest entity is nonassignable.

## PART 4. DISTRIBUTION INSTRUCTIONS

Distribution Amount \_\_\_\_\_ Distribution Date \_\_\_\_\_

### ASSET HANDLING (Assets identified below will be liquidated immediately unless otherwise specified in the Special Instructions section.)

Asset Description	Amount to be Distributed	Special Instructions
_____	_____	_____
_____	_____	_____
_____	_____	_____

### PAYMENT INSTRUCTIONS (The check will be made payable to the following charitable organization.)

Name of Charitable Organization \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Donor of Record (IRA Owner's name) \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Send the check to the  IRA Owner  Charitable Organization

Name of IRA Owner \_\_\_\_\_, Account Number \_\_\_\_\_

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**PART 5. SIGNATURES**

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I certify that I am authorized to receive payments from this IRA and that all information provided by me is true and accurate. I understand and have met the requirements for making a qualified charitable distribution from my IRA. No tax advice has been given to me by the trustee or custodian. All decisions regarding this distribution are my own, and I expressly assume responsibility for any consequences that may arise from this distribution. I agree that the trustee or custodian is not responsible for any consequences that may arise from processing this distribution.

**X**

\_\_\_\_\_  
Signature of IRA Owner

\_\_\_\_\_  
Date (mm/dd/yyyy)

**X**

\_\_\_\_\_  
Notary Public/Signature Guarantee *(If required by the trustee or custodian)*

\_\_\_\_\_  
Date (mm/dd/yyyy)

**X**

\_\_\_\_\_  
Authorized Signature of Trustee or Custodian

\_\_\_\_\_  
Date (mm/dd/yyyy)