

Leave a Gift Through Your IRA And Other Accounts

Making Audubon a beneficiary of your IRA/retirement plan, life insurance policy, bank account, CD, or other managed account is easy, fast, and can be done without an attorney. These types of legacy gifts are rapidly becoming popular, and play a significant role in sustaining our future conservation work.



Subject to multiple types of taxes, IRA, 401(k), and other qualified retirement plans are the best—and easiest—assets to leave to charity. You can designate all or a portion of the funds remaining in your plan as a gift to Audubon, and 100 percent of your gift will help protect the birds you love. And remember, you can change your mind at any point along the way.

To make this gift:

- Request or download a beneficiary form from your account manager.
- Name Audubon as a partial, contingent, or sole beneficiary of your account.
- If you are married, you will need to complete a spousal waiver form, also available from your account manager.

Legal name: National Audubon Society, Inc.
Tax ID number: 13-1624102

It is important to note that naming a beneficiary within the framework of your will is not sufficient; you must complete the appropriate paperwork provided by your plan's administrator.

For married people, a spousal consent form is also required by law. These forms are available with your plan's administrator.

We recommend you and your financial planner review your beneficiary forms every five years to make sure they are up to date.

WHAT DONORS SAY:

“

Changing my IRA beneficiary form to list Audubon as the recipient took me 10 minutes, was free, and now I'm delighted to have helped sustain Audubon's exciting work. I didn't have to update my will and I feel good knowing the gift will someday go directly to Audubon, without going through probate or my estate.”

—KEN L.

“

I am proud to include Audubon as a beneficiary of my retirement account. It was easy to set up, and a wonderful way to leave a gift to a movement that will outlive us all.”

—ELIZABETH L.

Let Us Know!

Notifying Audubon of your intended gift helps us honor your wishes in using your gift. To request a **Legacy Confirmation Form**, contact us at:

Audubon Office of Gift Planning

225 Varick St., 7th Floor
New York, NY 10014
www.audubon.org/legacyplannedgifts@audubon.org

Shari Kolding, CAP®

Director of Gift Planning
512.236.9076
shari.kolding@audubon.org

IRA Charitable Donations

A qualified charitable distribution (QCD), sometimes known as an IRA charitable “rollover gift,” can save you income taxes, as well as help minimize your taxable estate and fulfill your philanthropic wishes.

Good news: The ability to give directly from IRA accounts is now a permanent part of the U.S. tax code. The rule applies to individuals age 70½ and older, who may make income tax-free outright gifts up to \$100,000 from their IRAs to charities. The gift amount counts toward your Required Minimum Distribution (RMD) for donors age 72+. Gifts must be completed before December 31 to be eligible in the current tax year.

Important points to consider:

- You must be at least age 70½.
- The gift must be written as a check to Audubon, directly from your IRA account.
- If you are writing the check yourself from an IRA account:
 1. The check must clearly state the account is an IRA.
 2. The gift date is the date the funds clear your account—not the postmark date. We strongly recommend mailing checks before December 1 to allow extra time for your gift to be deposited.
- The gift may come from a Traditional or a Roth IRA (special exclusions may apply to other types of IRA accounts).
- Although there is no tax deduction, there is NO income tax on the withdrawal.

How do I give?

Checks should be mailed to:
ATTN: Office of Gift Planning
National Audubon Society
225 Varick St., 7th Floor
New York, NY 10014

Accompanying paperwork should identify your name and address, as well as any special instructions for Audubon.

For more information or if you have additional questions, please contact:

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What are the advantages?

- Benefit Audubon’s work in a meaningful way today.
- Meet your Required Minimum Distribution (RMD).
- Pay no income tax on the amount withdrawn for your gift.